

**AiM 4.1 User Manual
Supervisors & Assistant
Supervisors**

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Introduction

This manual will provide an overview of the AiM application, modules, and step-by-step instructions to complete individual screens within the modules.

Based on an individual's role the setup and modules available will determine the options available to users for use when working with this application.

Overview

In this manual you will learn how to:

- Logon to the AiM 4.1 application
- Identify terminology
- Identify icons
- Select a module
- Work with screens
- Perform a Search Query
- Create a Personal Query
- Use Note Logs
- Create a timecard using Rapid Timecard Entry
- Make corrections/changes to timecards
- Add descriptions to timecards
- Approve timecards
- Complete material and equipment requests
- Approve material and equipment requests
- Complete a Pick Ticket
- Complete a Counter Release
- Complete a Counter Return
- Create a Work Order
- Create a Phase for an existing Work Order
- Assign Work Orders
- Close work orders and phases

AiM Navigation

Getting Started

This section is designed to provide general navigation information that is needed when working with the AiM 4.1 application. It includes terminology and steps for accessing and navigating the system.

Terminology

This list provides a description of terms referenced in this manual and used in the AiM application.

Closed work order	A closed work order indicates that all work has been completed and all materials have been charged to the work order. It does not imply that all charges have been billed.
Customer Request	The customer request is the screen used to submit on-line requests for work. It defines what work is to be performed, who the work is for, and where the work is located. A customer request must be approved to become a work order.
Multi- shop work orders	These are work orders that require involvement of multiple shops to get a job done. The first shop assigned to a multiple shop work order is the “responsible” shop for coordinating the closure of the work order.
Non-Reimbursable	A work order is considered non-reimbursable if the work is routine maintenance to I&G funded buildings. An example of a non-reimbursable work order is moving furniture on campus.
Open work order	An open work order is a work order that is being actively worked on by shops. Shops can charge time and material to an open work order.
Non- Shop Stock	Inventory that is maintained in the Main Warehouse.
Phase	The phase is used for tracking each task performed in a work order. It defines the specific task details including: the work to be performed, the location of the work, who will perform the work, which asset or equipment is worked on, and when to perform the work.
Property	Identifies the building and is represented by an assigned number in the AiM system.
Reimbursable (Billable)	A work order is considered reimbursable if the work includes non-routine maintenance of I&G funded buildings or is not I&G related. Examples of reimbursable work are moving furniture off campus or setting up tables and chairs on campus.
Rapid Timecard Entry	The rapid timecard entry screen is used to quickly enter multiple time card records in a single entry screen. This will be the method for time entry for all non-exempt employees.
Shop Stock	Most of the OFS inventory is maintained in the Warehouse, but some areas maintain a small inventory within their shops. This inventory is known as shop stock.
Single shop work order	Work orders that can be completed within a single shop. A single shop work order may evolve into a multiple shop work order.
Work Order	The work order is the main screen used for tracking work in the system. It defines what work is to be performed, who the work is for, where the work is located, and how the work is classified.
Closed phase	A work order may have multiple shops (phases) involved. If a work order phase is closed for a particular shop, that shop cannot charge time or materials to that work order. Other shops assigned to work order may charge time and material to the work order as long as the phase is still open.

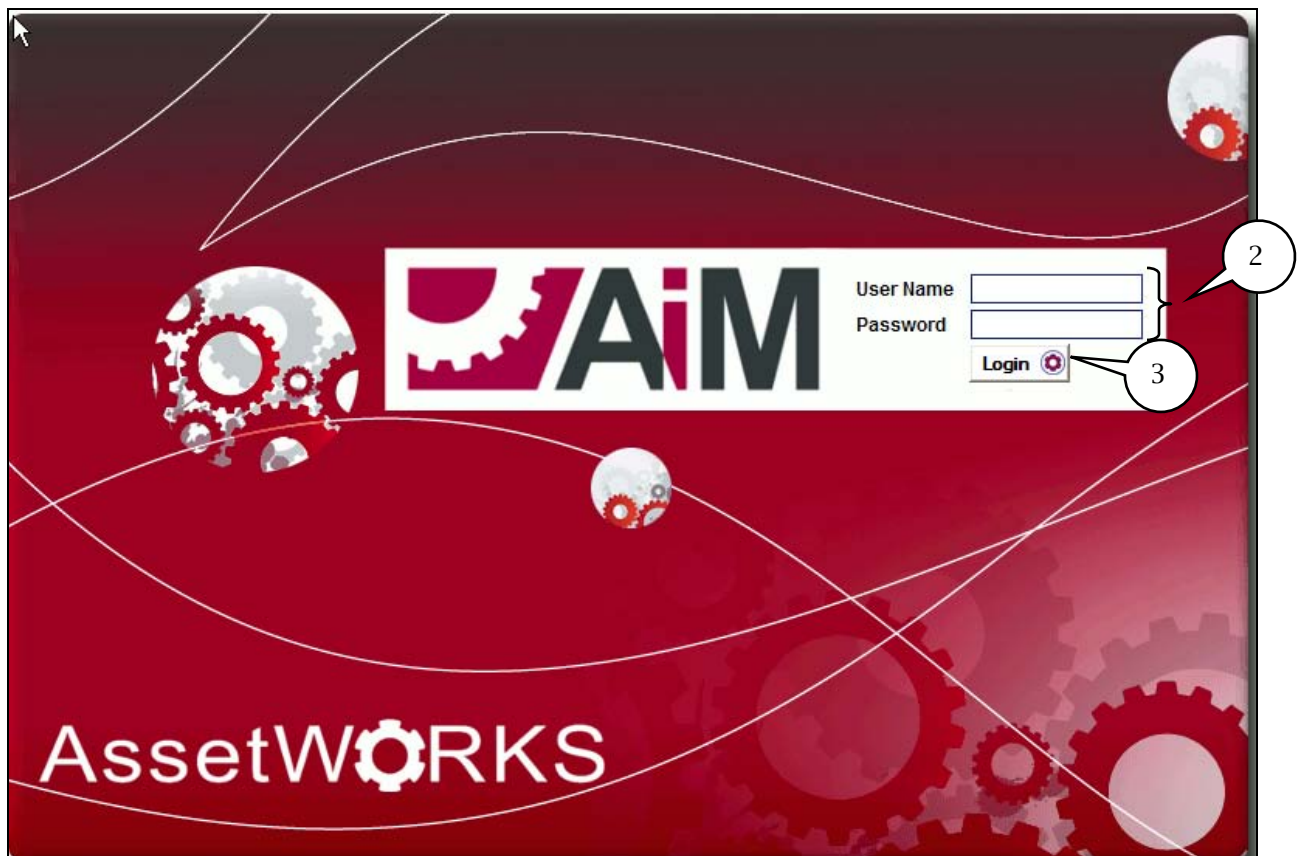
Logging on Process

AiM supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use AiM as an authenticated user, you must successfully logon by providing your credentials: MyNMSU Username and Password.

AiM can be accessed from any Internet browser such as Internet Explorer, Netscape, or Mozilla Firefox.

1. Type **http://fms-prod.nmsu.edu/fmax** in the address bar of your web browser and press Enter.

The logon screen will be displayed.

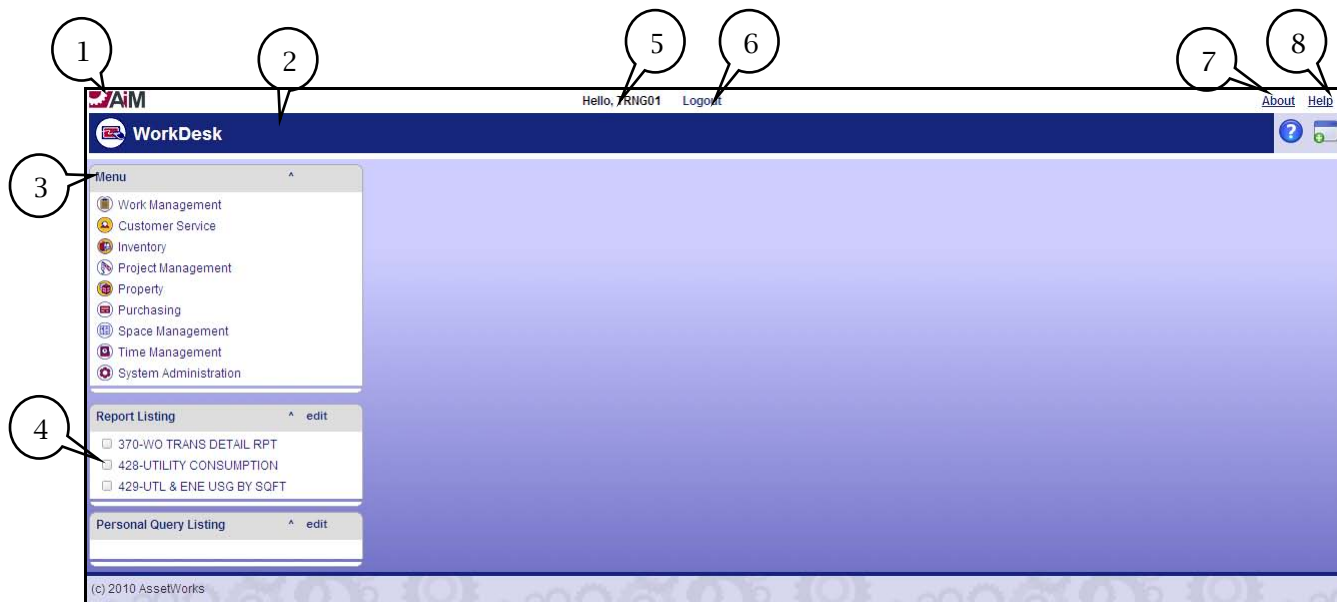


2. Enter your **User Name** and **Password** in the field boxes.
3. Click on the **Login** button.



You can create a bookmark in your browser for quick access to the AiM system.

Once you have logged on the *WorkDesk* will be displayed.



1. AiM icon identifies the vendor.

Note: When navigating away from the *WorkDesk* and working within the application it may be necessary to return to the *WorkDesk*. This can be performed by clicking on the *AiM* icon.

2. The **header** will display the *WorkDesk* and a *Module* once selected.
3. **Menu** will display Modules available for use (based on security Menu options may vary).
4. **Reporting Listing** will display a list of available reports. Reports listing will also be accessible from various Modules.
5. Greeting and **User ID** are displayed and identify the current logged on user.
6. **Logout** link is displayed and used to exit the application.

Note: It is recommended to logout properly from the application by using the *logout* link.






















7. **About** provides vendor information and version of application.
8. **Help** provides access to on-line Help (this information comes with the application).















Once logged on, use the icons within the application to navigate; do not use the browser options available. To properly logoff, use the *Logout* link; do not use the X (exit browser options).

Navigation Icons

Below is a list of the common navigation icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	New	Alt + I		Quick Find Filter	Alt + F
	Edit	Alt + E		Zoom	Alt + Z
	Back to Browser	Alt + B		Cancel	Alt + C
	Save	Alt + S		Done	Alt + O
	Copy Record	Alt + Y		Previous Browse	Alt + P
	Email Record	Alt + M		Next Browse	Alt + N
	Print	Alt + J		First Browse	Alt + F
	Export	Alt + V		Last Browse	Alt + L
	Execute Search	Alt + S		Go	Alt + G
	Search	Alt + S		Next	Alt + 3
	Help	Alt + ?	Intentionally left blank	Intentionally left blank	Intentionally left blank

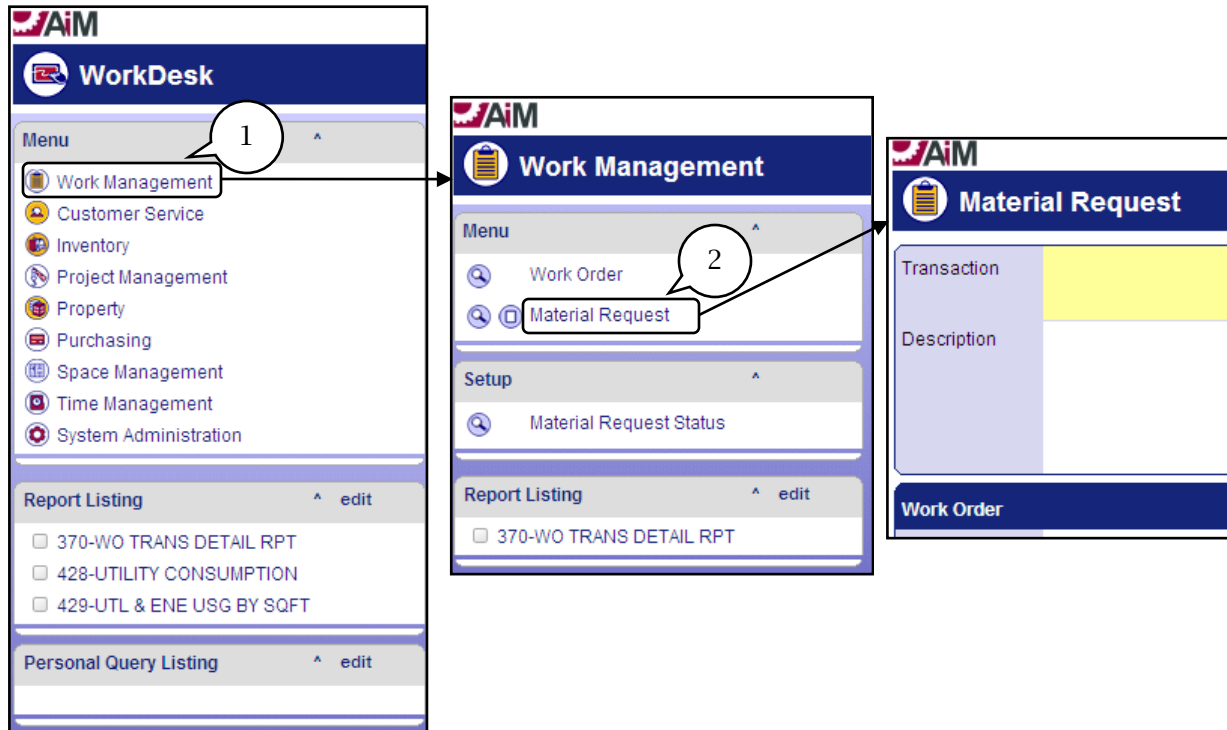
Below is a list of additional icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	Add Detail Record	Alt + A		Error Log	Alt + L
	Delete Detail Record	Alt + D		Error Flag	Intentionally left blank
	Approve/Yes	Alt + A		Reset	Alt + R
	Reject/No	Alt + R		Add Query	Alt + A
	Generate	Alt + G		Remove Query	Alt + D
	Add Content(WorkDesk)	Alt + I		Reset (WorkDesk)	Alt + R

Note: The keyboard short cuts are dependent on the screen displayed.

Navigation from WorkDesk to Module to Screen

Displayed below is the flow to access a screen from the *WorkDesk*. This process is applicable for accessing all modules.



1. Select desired *Module*. *Module* will be displayed.
2. Select desired Screen. Screen will be displayed.

Selecting A Module

When working with a **Module**, screens are available for selection allowing required activity to be performed based on the user's role.



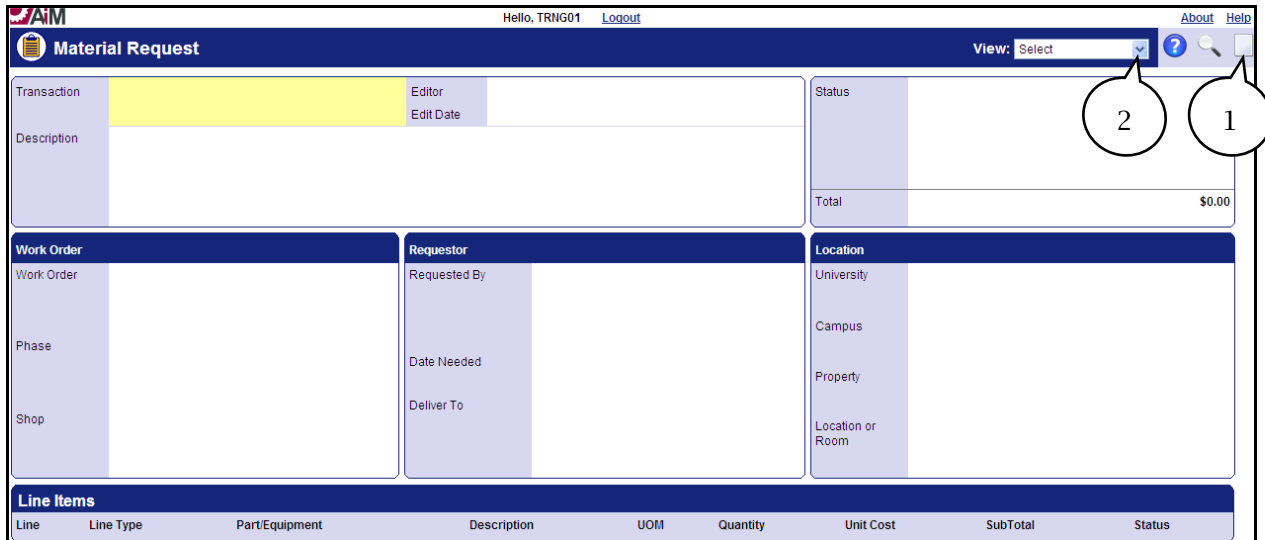
1. To select a **Module** place cursor over the desired **Module** and click to select. **Module** will be displayed. Once in a Module a list of screens will be available for selection as displayed below.



2. Selected **Module** and **Menu** options will be displayed.
3. The Icon identifying the **Module** will be displayed. When working in a screen, clicking on the **Module** Icon will return the **Module** Menu.
4. To go directly to a Screen, click on desired **Screen** name from the menu list.
5. The **Search** icon directly opens the **Search** options for that screen, allowing a quick search of a record or data on the screen displayed.
6. By clicking on the **New** icon, it opens a new record in edit mode, ready for information to be entered.

Working in a Screen

Once a screen is open it will always be in a query state. To create a new or edit a record, use the applicable icons displayed in the header on the right hand corner of the main title bar.



The screenshot displays the 'Material Request' screen in the AiM system. The header bar includes the title 'Material Request' and a 'View: Select' dropdown menu. Two callout boxes are present: box 1 points to the 'New' icon (a plus sign) and box 2 points to the 'Edit' icon (a pencil). The main area contains several sections: 'Transaction' with fields for Editor and Edit Date; 'Description' for text input; 'Status' for selection; 'Total' showing a value of \$0.00; 'Work Order' with fields for Work Order, Phase, and Shop; 'Requestor' with fields for Requested By, Date Needed, and Deliver To; 'Location' with fields for University, Campus, Property, and Location or Room; and a 'Line Items' table with columns for Line, Line Type, Part/Equipment, Description, UOM, Quantity, Unit Cost, SubTotal, and Status.

1. To request new *Material Request* click on the **New** icon which will open the screen and place it in a ready state for fields to be completed.
2. The **View** field provides additional screens available while working within a screen.

AiM Hello, TRING01 [Logout](#) [About](#) [Help](#)

Material Request View: [Select](#) ? [X] [Print]

Transaction	14425	Editor	TRING01	Status	ENTERED
Description		Edit Date	Sep 29, 2010 09:21 AM	Total	\$0.00

Work Order	Requestor	Location
Work Order	Requested By	University
Phase	Date Needed	Campus
Shop	Deliver To	Property
		Location or Room

Line Items [X] [Print]

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
------	-----------	----------------	-------------	-----	----------	-----------	----------	--------

- When working on a new screen or editing a screen, required fields are outlined in red. Information is segmented into data Blocks with headings (example: above shows **Work Order**, **Requestor** and **Location** blocks).

Search Screen Defined

The *Search* screen is a very powerful option within the application that gives users the ability to perform various types of searches based on criteria entered. This section will provide a general overview and introduction of the options available on the *Search* screen. The *Module* displayed will determine the data criteria that are available for selection.

When performing a *Search* ask the question, “What information am I looking for?” This will assist when keying in the exact criteria needed to perform the *Search*.

The screenshot displays the 'Work Order' search interface. It features a list of search criteria on the left, including 'Work Order', 'Description', 'Created By', 'Date Created', 'Status', 'University', 'Campus', 'Property', 'Project', 'Problem List', 'Organization', 'Requestor', 'Contact', 'Contact Phone', 'Contact Email', 'Budget', 'Desired Date', 'Customer Request', 'Reference', 'Shop', 'Shop Person', 'Cash Flow Yr 1', 'Cash Flow Yr 2', and 'Cash Flow Yr 3'. Each criterion has a dropdown menu for selection and a text input field for the search value. Callout boxes 1 through 4 highlight specific features: 1 points to the 'Problem List' dropdown, 2 points to the 'Work Order' dropdown, 3 points to the 'Description' text input, and 4 points to the 'Hide All/Show All' button.

With the *Search* screen displayed perform a search by using the various search options listed below.

1. Ascending/Descending fields. This option can be used to have search results in Ascending/Descending order. From the drop down list make desired selection.
2. **Sort sequences** fields. This is optional and not required to perform a *Search*. To sort your *Search* results in a specific order you can use the *Sort Sequence* fields. In the box enter your order by placing 1, 2, etc. This will display and sort the fields on the results screen.

3. **Operator** (text qualifiers) field, drop down box: Use any of the standard operations to assist in narrowing searches to find the exact information desired.

Standard Operations

=	Equal
<	less than
>	greater than
>=	greater than or equal to
<=	less than or equal to
<>	not equal to
Starts with (starts w/string entered)	
Ends with (ends w/string entered)	
Contains (contains the string entered anywhere in the field)	
Null (must contain a value)	
Not null (must Not contain a value)	
In (list items to include)	
Not in (list items to omit)	
Between: Dates only (fill in as required)	
Within: Dates only (fill in as required)	
Older than (select desired option)	
Newer than (select desired option)	

4. **Criteria** field: Within the field box, enter the information needed to perform the search, or by using the **Zoom** icon the appropriate selection options will be displayed.

Note: If searching in a *Description* field, consider selecting *Contains* from the operator field and then using the *Wild Card* % (percent sign) before and after the criteria entered to define your *Search*. It is recommended to keep a *Search* to one or two words. Example: looking for the word "Air", enter %Air% in the description field. If using two words, enter %Air%%conditioning%.



While working in the Search Screen you may find that some fields may be hidden. To display hidden fields click on *Show* if you want to hide fields click on *Hide*.

Performing a Search Query

Below is an example of performing a *Search Query*. Remember based on your *Module* selection, criteria fields displayed may vary.

With the *Search* screen displayed, search for all open work orders for a shop by completing the following steps.

The screenshot shows the 'Work Order' search interface. The left sidebar lists various criteria: Work Order, Description, Created By, Date Created, Status, University, Campus, Property, Project, Common Problem List, Type, Category, Organization, Requestor, Contact, Contact Phone, Contact Email, Budget, Desired Date, Customer Request, Reference, Shop, Shop Person, Cash Flow Yr 1, Cash Flow Yr 2, and Cash Flow Yr 3. The right side shows the input fields for these criteria. Callout 1 points to the 'Status' field with the value 'OPEN'. Callout 2 points to the 'Shop' field with the value 'HVAC'. Callout 3 points to the 'Search' icon in the top right corner of the title bar.

1. Type “**open**” in the **Status** field (fields are not case sensitive).
2. Type “**HVAC**” or desired *Shop* in the **Shop** field.

Note: To display a listing of the data fields, use the *Zoom* icon. Leave the Shop field blank. Click on the *Zoom* icon and select a shop.

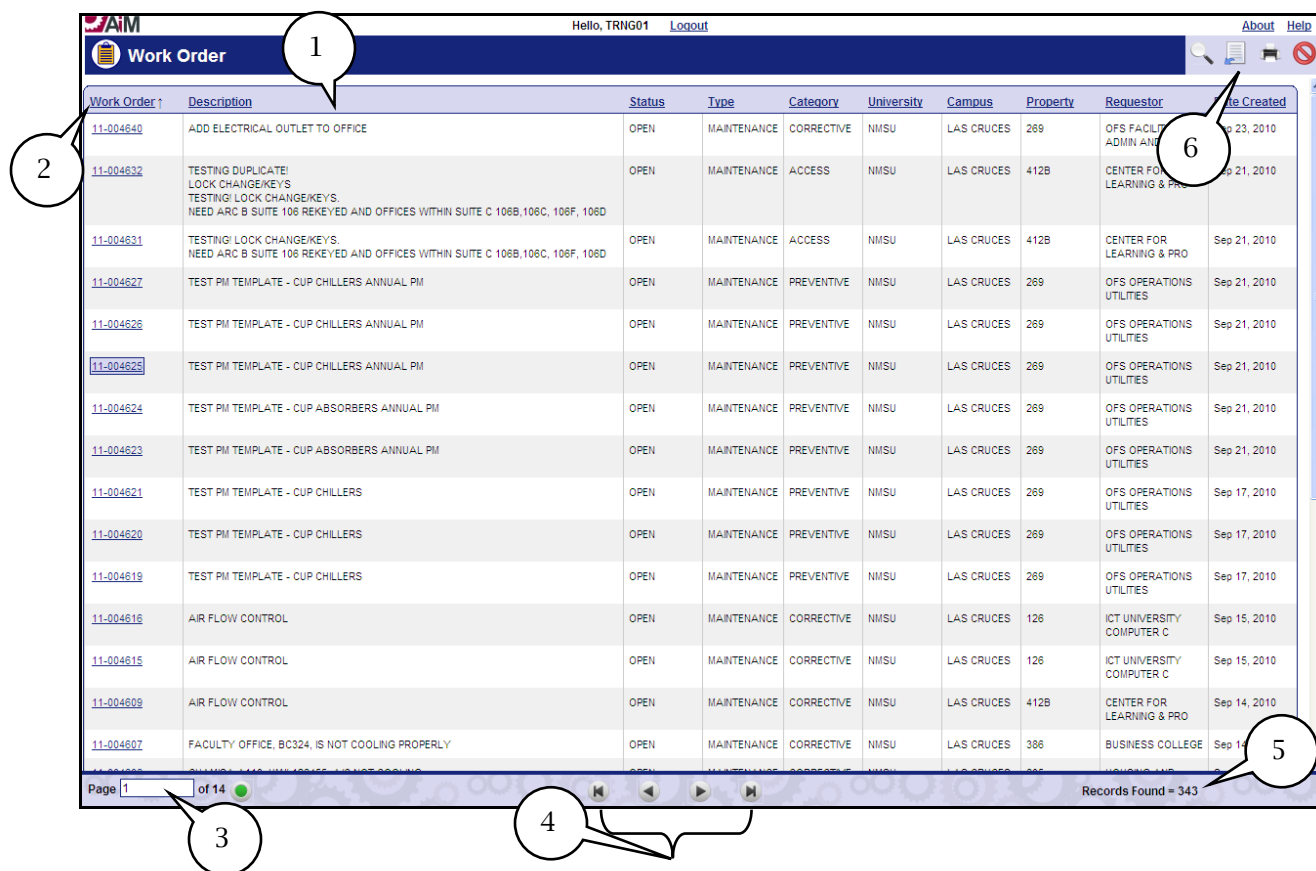
3. Click on the **Search** icon located on the main title bar.
4. The search results will be displayed based on the criteria entered.
5. To perform another query, go back to the *Search* screen (click *Search* icon) and make modifications to run another *Search*.



To return to the *Module* Menu click on the *module* icon to the left of the *Module* title.

Looking at your Search Query Results

With the search results displayed review the screen below.



The screenshot shows the 'Work Order' search results interface. Callout 1 points to the header bar. Callout 2 points to the 'Work Order' column header. Callout 3 points to the 'Page 1 of 14' navigation area. Callout 4 points to the 'DVD' navigation icons. Callout 5 points to the 'Records Found = 343' status. Callout 6 points to the 'Date Created' column header.

Work Order	Description	Status	Type	Category	University	Campus	Property	Requestor	Date Created
11-004640	ADD ELECTRICAL OUTLET TO OFFICE	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	269	OFS FACILITY ADMIN AND	Sep 23, 2010
11-004632	TESTING/ LOCK CHANGE/KEYS TESTING/ LOCK CHANGE/KEYS. NEED ARC B SUITE 106 REKEYED AND OFFICES WITHIN SUITE C 106B,106C, 106F, 106D	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 21, 2010
11-004631	TESTING/ LOCK CHANGE/KEYS. NEED ARC B SUITE 106 REKEYED AND OFFICES WITHIN SUITE C 106B,106C, 106F, 106D	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 21, 2010
11-004627	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004626	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004625	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004624	TEST PM TEMPLATE - CUP ABSORBERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004623	TEST PM TEMPLATE - CUP ABSORBERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004621	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004620	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004619	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004618	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	126	ICT UNIVERSITY COMPUTER C	Sep 15, 2010
11-004615	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	126	ICT UNIVERSITY COMPUTER C	Sep 15, 2010
11-004609	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 14, 2010
11-004607	FACULTY OFFICE, BC324, IS NOT COOLING PROPERLY	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	386	BUSINESS COLLEGE	Sep 14, 2010

1. Column headings are **Work Order, Description, Status, Type, Category, University, Campus, Property, Requestor** and **Date Created**.
2. Columns can be sorted by clicking on one of the column headings.
3. **Page Navigation** is located at the bottom of the screen. This will represent the number of pages available for review. To go directly to a specific page, enter the page number in the field and click on the green **Go** icon.
4. **Page (DVD) Navigation**: forward/backward icons, and first page/last page icons.
5. **Records Found** identifies the number of records found for the search selection.
6. Icon bar displays the additional available icon options on the screen displayed. By holding your mouse over the icon, it displays the function of the icon.

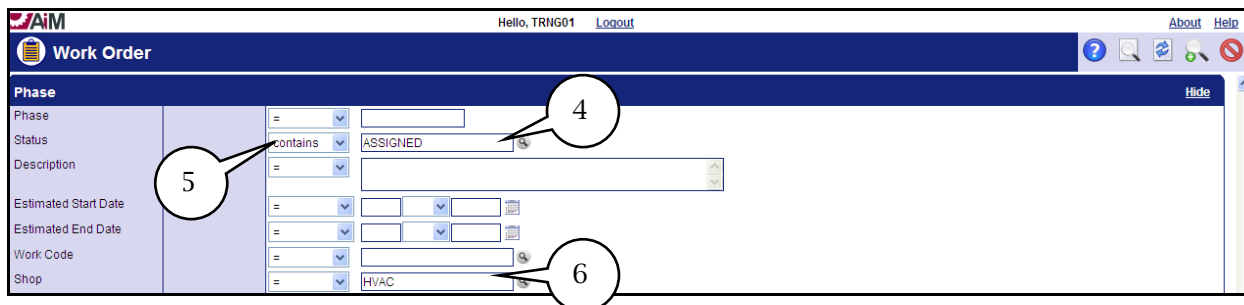
Create a Personal Query

Personal Queries, that provide *Searches* for information specific to the users, can be created and added to the *WorkDesk* for easy access.

This example creates a *Personal Query* to list all work orders assigned to an employee.

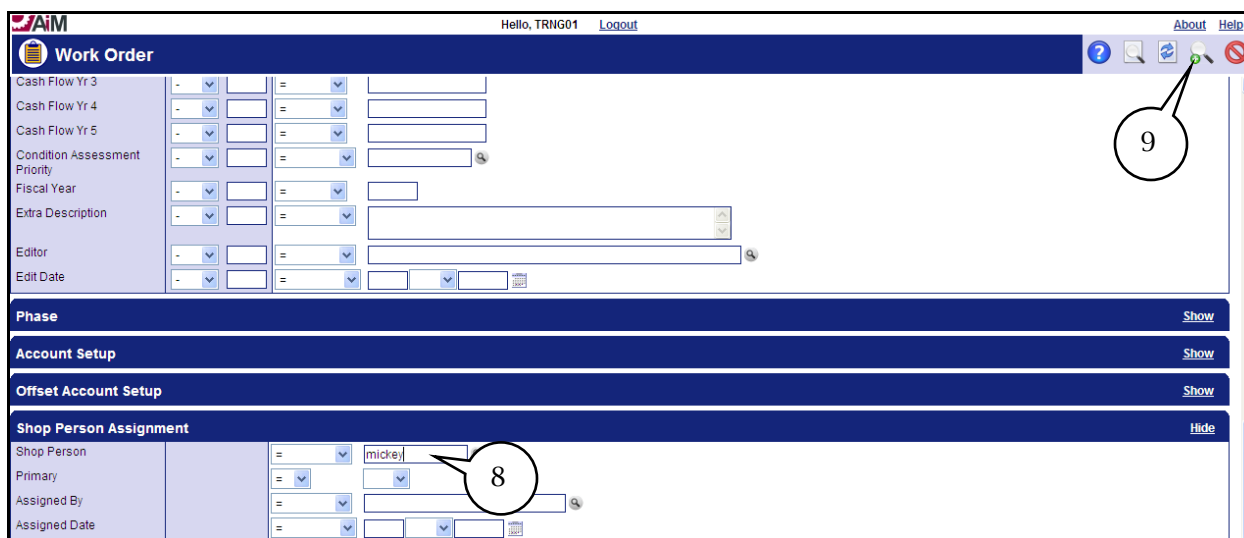
1. First open any *Search* screen and select **Work Order** from the **Work Management Module**.

2. While working in the *Search* screen the scroll bar will be available.
3. With the *Search* screen displayed use the scroll bar, moving down, to locate the data elements **Status** and **Shop** under the **Phase** block.



The screenshot shows the 'Work Order' form in the AiM system. The 'Phase' section is expanded, showing fields for Phase, Status, Description, Estimated Start Date, Estimated End Date, Work Code, and Shop. Callout 4 points to the Status field which contains 'ASSIGNED'. Callout 5 points to the 'contains' dropdown menu. Callout 6 points to the Shop field which contains 'HVAC'.

4. Enter **Assigned** in the **Status** field.
5. Select **contains** from the operations field drop down list (click on the down arrow to display operation choices).
6. Enter the name of the shop in the **Shop** field, or click on the **Zoom** icon to select a **Shop**.
7. Scroll down again until you locate the **Shop Person Assignment** block.



The screenshot shows the 'Work Order' form with the 'Shop Person Assignment' section expanded. Callout 8 points to the 'Shop Person' field which contains 'mickey'. Callout 9 points to the 'Add Query' icon in the top right corner of the form.

8. Enter employee **User ID** in the **Shop Person** field box.
9. Click on the **Add Query** icon.
10. The following **Personal Query** screen will be displayed.

The screenshot shows the 'Personal Query' interface. At the top, there's a header with 'Hello, TRNG01' and a 'Logout' link. Below the header, the 'Personal Query' section has a 'Query' field containing 'ASSIGNED WORK ORDERS' (highlighted with a yellow box and callout 11) and an 'Edit' button. Below this is a 'Description' field (callout 14). To the right, a 'Module' dropdown is set to 'Work Management' and a 'Screen' dropdown is set to 'Work Order' (callout 15). Below the 'Personal Query' section, there's an 'Alert Level' section with 'Yellow' and 'Red' options. To the right of this is the 'WorkDesk' section, which has a 'Query Listing' dropdown set to 'Yes' (callout 12) and a 'Query Count' dropdown set to 'Yes' (callout 13). At the top right of the interface, there are 'About' and 'Help' links.

11. Enter a name for the *Personal Query* (e.g. Assigned Work Orders).
12. Click the arrow next to the **Work Desk** field and select **Yes** (results will be displayed in the *Personal Query* list on the *WorkDesk*).
13. Click the arrow next to the **Work Desk Count**, select **Yes**. This will provide a count in front of the work order *Personal Query* on the *WorkDesk*.
14. Though not required, the same information or name given to the *Personal Query* (step 11) can be entered in the **Description** field.
15. When finished click on the **Done** icon to return to the previous *Search* screen.
16. Click on the **Save** icon (not shown) located on the header.
17. Click on the AiM icon (not shown) to return to the *WorkDesk*.

Using Note Logs

When creating a record (*Timecard*, *Customer Requests*, etc.) the *Description* field is often used; however, the number of characters (text) that can be entered is limited, and descriptions can be changed, deleted, etc. After creating and saving a record the *Notes Log*, which is a valuable feature in the AiM application, becomes available. The *Notes Log* is not limited in the number of characters (text) that can be entered and, once entered, becomes a permanent record.

The following screen shot represents a record that has been created and saved in the AiM application. To use the *Notes Log*, complete the following steps.



Customer Request

Transaction: **16833** Editor: DOLAREY Date Created: Sep 29, 2010 01:11 PM Request Status: [SUBMITTED](#)

Request Details

Common Problem List: [LOCK CHNGE/KEYS](#)

Description: LOCK CHANGE/KEYS. STANDARD LOCK NEED TWO DRAWER FILE CABINET IN ARC B 101. LOCK REPAIRED AND KEY REPLACED WILL NOT LOCK UNLOCK.

Work Order

Desired Date: Reference:

Requestor

Organization: [F00603](#) CENTER FOR LEARNING & PROF. DEV.
Requestor: [CENTER FOR LEARNING & PRO](#)
Contact: DEE O'LAREY
Contact Phone: 646-7176
Contact Email: dolarey@nmsu.edu

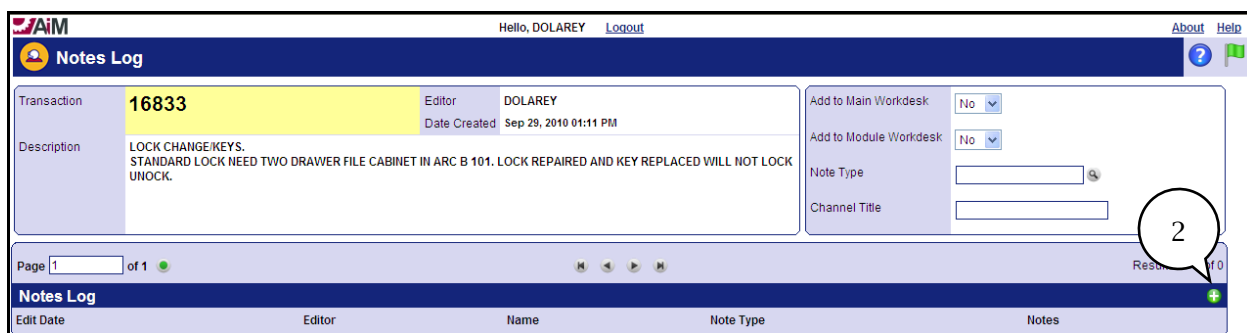
Accounts

Index: >00000<
HUMAN RESOURCE SERVICES FUND:111260 ORG:530350
Acct Code: 758500
PPD SERVICES

Location

University: [NMSU](#) NEW MEXICO STATE UNIVERSITY
Campus: [LAS CRUCES](#) LAS CRUCES
Property: [412B](#) ACADEMIC RESEARCH B
Location or Room: [106A](#)

1. Click on the **View Select** arrow, select **Notes Log** from the drop down list, and the following screen will be displayed.



Notes Log

Transaction: **16833** Editor: DOLAREY Date Created: Sep 29, 2010 01:11 PM

Description: LOCK CHANGE/KEYS. STANDARD LOCK NEED TWO DRAWER FILE CABINET IN ARC B 101. LOCK REPAIRED AND KEY REPLACED WILL NOT LOCK UNLOCK.

Add to Main Workdesk: No
Add to Module Workdesk: No
Note Type:
Channel Title:

Page 1 of 1

Edit Date	Editor	Name	Note Type	Notes
Add Notes				

2. Click on the **Add Notes** icon (green plus sign) and the following screen will be displayed.

The screenshot shows the 'Note' form in the AiM 4.1 application. The form has a dark blue header with the 'AiM' logo, a user greeting 'Hello, DOLAREY', and a 'Logout' link. On the right of the header are 'About' and 'Help' links. The main form area is divided into several sections:

- Transaction:** A yellow box containing the number '16833'.
- Editor:** A box containing 'DOLAREY'.
- Date Created:** A box containing 'Sep 29, 2010 01:11 PM'.
- Description:** A text area containing 'LOCK CHANGE/KEYS. STANDARD LOCK NEED TWO DRAWER FILE CABINET IN ARC B 101. LOCK REPAIRED AND KEY REPLACED WILL NOT LOCK UNLOCK.'
- Entry Date:** A box containing 'Sep 29, 2010 01:18 PM'.
- Login:** A box containing 'DOLAREY'.
- Note Type:** A dropdown menu with a small icon to its right, labeled with callout '3'.
- Notes:** A large text area for entering notes, labeled with callout '4'.
- Save Icon:** A small icon in the top right corner of the form, labeled with callout '5'.

3. Click on the **Notes Type Zoom** icon and make the appropriate selection. For example, give *AUTHORIZATION* to use a specified index number.
4. Type the desired information in the **Notes** field. This will store the Note with the attached Customer Request.
5. Click on the **Save** icon.

Rapid Timecard Entry

Employee *Timecards* are generated through the process of *Rapid Timecard Entry*. After employees complete the process of entering time, *Timecards* become available for supervisor review and approval. The following *Rapid Timecard Entry* steps must be completed for each day in the pay period.

After logging on, the AiM **WorkDesk** will be displayed.



1. Click on **Time Management** and the following screen will be displayed.



2. Click on **Rapid Timecard Entry** and the following screen, used to create default data for subsequent *Line Items*, will be displayed.

3. Select a **Work Date** by clicking on the calendar icon.
4. Enter employee **Username** in **Shop Person** field then click the **Zoom** icon which will validate the field if the **Username** is correct. Or click on the **Zoom** icon and select the appropriate **Employee ID**, or use the **Search** feature described in the **Search Query** section of this manual.

Note: **Time Type** and **Shift** fields will automatically populate.

5. Click on the **Add Timecard Item** icon once for each **Line Item** that will be entered for the **Work Date** and the following screen will be displayed. For example, if the employee wants to record 4 hours of work on two different **Work Orders** click the **Add Timecard Item** icon twice to create two **Line Items**.

Note: Default data selected in steps 3 & 4 will automatically populate to the added **Timecard Line Items**.

6. Click on the **Zoom** icons if **Time Type** (e.g. overtime, on-call pay, etc.) or **Shift** (e.g. swing or graveyard shift) fields need to be changed.

Note: Any work performed over 8 hours for a **Work Date** (day) will be recorded as overtime.

7. If leave was taken, click on the **Zoom** icon and select the appropriate **Leave Code**.

Note: **Time Type** and **Shift** fields will clear.

Work Date	Shop Person	Time Type Shift	Leave Code	Work Order Phase	Action Taken	Hours
17 Sep 2010	JAPADILL JOHN PADILLA	REG REG				
17 Sep 2010	JAPADILL JOHN PADILLA	REG REG				
17 Sep 2010	JAPADILL JOHN PADILLA	REG REG				

8. Enter work order and phase numbers in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.

Note: A *Work Order* is established to record *Administrative* time, and will have a different *Phase* for each calendar month.

9. Enter the hours worked, or leave, for this *Work Date Line Item*. A standard *Work Date* (day) is 8 hours.

Note: Time must be entered in one hour and/or one-quarter hour increments. For example: .5=1/2 hour, 1.0=1 hour, 1.25=1 1/4 hours, 1.5=1 1/2 hours, and 1.75=1 3/4 hours.

10. Repeat steps 8-11 for each *Line Item*. After entering information, the screen will look like the one below.

Work Date	Shop Person	Time Type Shift	Leave Code	Work Order Phase	Action Taken	Hours
17 Sep 2010	JAPADILL JOHN PADILLA	REG REG		11-003076 004 PAINTERS PAINT ROOMS		8
17 Sep 2010	JAPADILL JOHN PADILLA	OT REG		11-003076 004 PAINTERS PAINT ROOMS		1

11. Review all data entry for accuracy and click on the **Save** icon. The following screen will be displayed and the *Timecard* is now available for supervisor approval.
- 12.

Note: If an employee has not been assigned to a *Work Order Phase*, when the *Rapid Timecard Entry* is saved in Step 11 a screen will be displayed which states, "Shop person not assigned to the phase. Do you want to continue?" Click on the **Yes** icon.

12

Work Date	Shop Person	Time Type Shift	Leave Code	Work Order Phase	Action Taken	Hours
Sep 17, 2010	JAPADILL JOHN PADILLA	REG REG		11-003076 004 PAINTERS PAINT ROOMS		8.00
Sep 17, 2010	JAPADILL JOHN PADILLA	OT REG		11-003076 004 PAINTERS PAINT ROOMS		1.00

13. Click on the *Timecard* number and the following *Timecard* screen will be displayed.

13

Transaction	Editor	Status
51439	SREL	Not Posted

Shop Person	Total Hours	Total Cost
JAPADILL	Non-Leave Hours 17.00	Original Cost \$491.65
JOHN PADILLA	Leave Hours 0.00	Adjusted Cost \$0.00
Work Date Sep 17, 2010	Total Hours 17.00	Total Cost \$491.65

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	
3	OT	REG		11-003076	004		1	\$37.73	

14. Print the *Timecard* by clicking on the **Print** icon and give to the supervisor.



Depending on the work performed on a particular day, more than one *Timecard Line Item* may be required

The Rapid Timecard Entry process is now complete!

Corrections/Changes to a Timecard

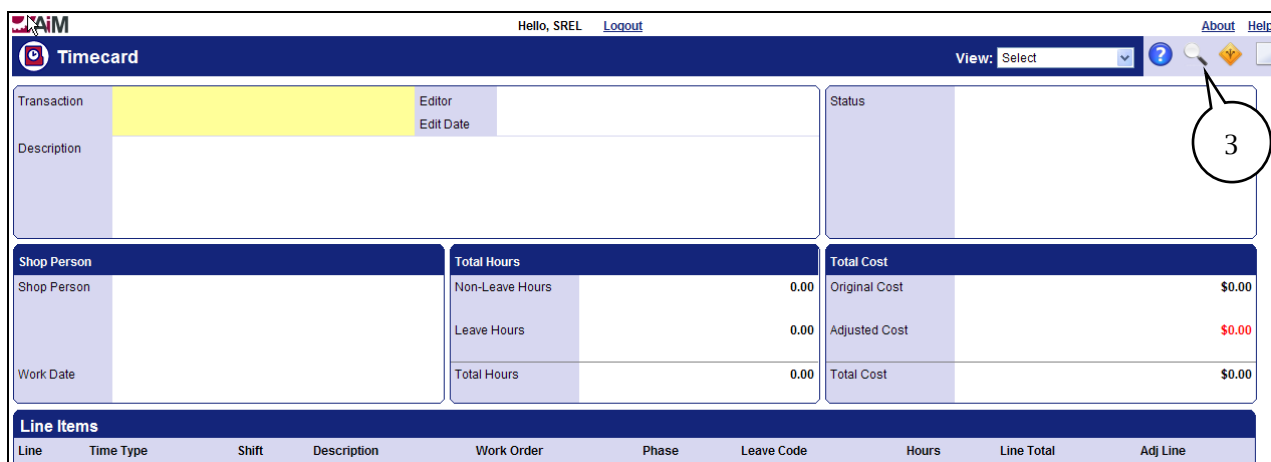
Changes can be made to a *Timecard* as long as it **has not been approved** by the supervisor, after which the supervisor must request a time card adjustment through OFS Human Resources. If a *Timecard* is **Rejected** by the supervisor, employees will have a *Personal Query* link on their AiM *Work Desk* to alert them of *Timecard Rejections*. *Line Items* originally entered through *Rapid Time Entry* can be deleted from the *Timecard* and new *Line Items* can be added.

To make changes to a *Timecard*, the following steps must be completed.

1. Select the **Time Management** module and the following menu will be displayed.



2. Click on **Timecard** and the following screen will be displayed.



The screenshot shows the AiM 'Timecard' entry screen. It includes fields for Transaction, Editor, Edit Date, Status, and Description. Below these are sections for Shop Person, Total Hours, and Total Cost. At the bottom is a table for Line Items. A callout bubble with the number 3 points to the 'Search' icon in the top right corner.

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line

3. To locate the *Timecard* that needs to be changed, click on the **Search** icon and the following screen will be displayed. Or use the *Search* feature as described in the *Search Query* section.

4

4. Click on the **Execute Search** icon and the following screen will be displayed.

5

Transaction	Person	Last Name	First Name	Work Date	Entry Date	Status
51439	JAPADILL	PADILLA	JOHN	Sep 17, 2010	Sep 21, 2010	Not Posted

5. Select the **Transaction number (Timecard)**, associated with the **Shop Person** and **Work Date**, that needs to be changed and the following screen will be displayed.

6

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	
3	OT	REG		11-003076	004		1	\$37.73	

6. Click on the **Edit** icon and the following screen will be displayed.

Transaction 51439 **Editor** SREL **Status** Not Posted
Edit Date Sep 21, 2010 11:15 AM

Description

Shop Person
 Shop Person JAPADILL
 JOHN PADILLA
 Work Date Sep 17, 2010

Total Hours
 Non-Leave Hours 17.00
 Leave Hours 0.00
 Total Hours 17.00

Total Cost
 Original Cost \$491.65
 Adjusted Cost \$0.00
 Total Cost \$491.65

Line Items

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj
<input type="checkbox"/> 1	REG			11-003076	004		8	\$22	
<input type="checkbox"/> 2	REG			11-003076	004		8	\$22	
<input type="checkbox"/> 3	OT			11-003076	004		1	\$37.73	

7. To delete a **Line Item**, click on the box to the left of the **Line** number and a check mark will appear in the box.
8. Click on the **Delete Timecard Item** (red subtraction sign) icon and the following screen will be displayed.

Modal Message

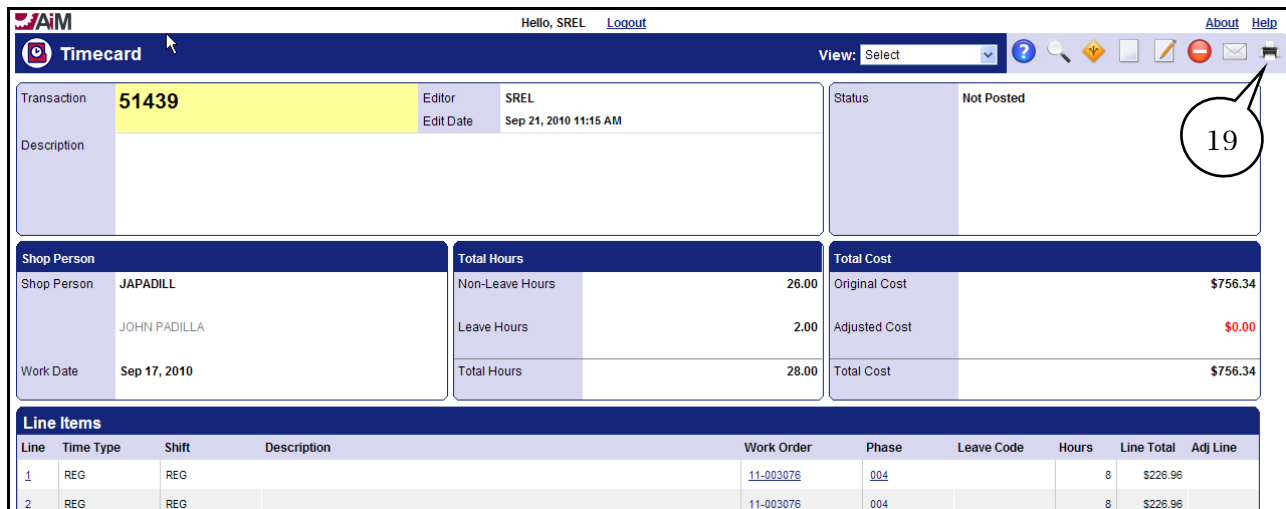
Are you sure you want to delete?

9. Click on the **YES** icon (green check mark) to delete the **Line Item** or the **NO** (red "X") icon if a **Line Item** has been selected in error. Repeat steps 7-9 if additional **Line Items** need to be deleted.
10. To add new **Line Items** click on the **Add Timecard Item** icon (green plus sign) and the following screen will be displayed. If no new **Line Items** are needed, go to step 18.

11. Enter a **Description** (optional).
12. Enter work order and phase numbers in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.
13. Click on the **Zoom** icons if **Time Type** (e.g. overtime, on-call pay, etc.) and **Shift** (e.g. swing or graveyard) fields need to be changed.
14. If leave was taken, click on the **Zoom** icon and select the appropriate **Leave Code**.
15. Enter the hours worked, or leave, for this *Work Date Line Item*.
16. Click on the **Done** icon. Repeat steps 10-16 if additional *Line Items* need to be added.
17. After clicking on the **Done** icon, the following screen will be displayed.

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8.00	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	

18. Click on the **Save** icon and the following screen will be displayed.



HiM
Hello, SREL [Logout](#) [About](#) [Help](#)

Timecard View: [Select](#)

Transaction: **51439** Editor: SREL Status: Not Posted
Edit Date: Sep 21, 2010 11:15 AM

Description:

Shop Person		Total Hours		Total Cost	
Shop Person	JAPADILL	Non-Leave Hours	26.00	Original Cost	\$756.34
	JOHN PADILLA	Leave Hours	2.00	Adjusted Cost	\$0.00
Work Date	Sep 17, 2010	Total Hours	28.00	Total Cost	\$756.34

Line Items							
Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours
1	REG	REG		11-003076	004		8
2	REG	REG		11-003076	004		8

19. Print the corrected *Timecard* by clicking on the **Print** icon and give to the supervisor.



Corrections/Changes can be made to *Timecards* any time prior to supervisory *Approval/Rejection* by following the previous steps.

The Corrections/Changes to a Timecard process is now complete!

Adding Descriptions to Timecards

When entering time through *Rapid Timecard Entry*, descriptions cannot be provided for *Line Items* entered; however, descriptions can be added by going to the employee *Timecard* and completing the following steps.

1. Select a *Timecard* and the following screen will be displayed.

The screenshot shows the AiM Timecard interface. At the top, it says 'Hello, SREL' and 'Logout'. The main header is 'Timecard' with a 'View: Select' dropdown. Below this, there's a section for 'Transaction 51439' with 'Editor SREL' and 'Edit Date Sep 21, 2010 11:15 AM'. To the right, the 'Status' is 'Not Posted'. A callout bubble with the number 2 points to the 'Edit' icon in the top right corner. Below this, there's a section for 'Shop Person' with 'JAPADILL' and 'JOHN PADILLA', and 'Work Date Sep 17, 2010'. To the right, there's a 'Total Hours' section with 'Non-Leave Hours 26.00', 'Leave Hours 2.00', and 'Total Hours 28.00'. Further right, there's a 'Total Cost' section with 'Original Cost \$756.34', 'Adjusted Cost \$0.00', and 'Total Cost \$756.34'. At the bottom, there's a 'Line Items' table with columns: Line, Time Type, Shift, Description, Work Order, Phase, Leave Code, Hours, Line Total, and Adj Line. The table has two rows: Line 1 (REG, REG, 11-003076, 004, 8, \$226.96) and Line 2 (REG, REG, 11-003076, 004, 8, \$226.96).

2. Click on the **Edit** icon and the following screen will be displayed.

The screenshot shows the AiM Timecard interface after clicking the 'Edit' icon. The layout is similar to the previous screenshot, but the 'Description' field for the transaction is now empty. A callout bubble with the number 3 points to the 'Line Item' number 1 in the table. The 'Line Items' table has columns: Line, Time Type, Shift, Description, Work Order, Phase, Leave Code, Hours, Line Total, and Adj Line. The table has two rows: Line 1 (REG, REG, 11-003076, 004, 8, \$226.96) and Line 2 (REG, REG, 11-003076, 004, 8, \$226.96).

3. Click on the **Line Item** number that needs a description and the following screen will be displayed.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Timecard Line Item View: Select

Line **1** Editor SREL Edit Date Sep 21, 2010 02:50 PM Status Not Posted

Description

Shop Person JAPADILL JOHN PADILLA Work Date Sep 17, 2010

Labor Rate Time Type REG REGULAR STAFF EARNINGS Shift REG REGULAR NONEXEMPT Labor Rate \$28.37

Line Totals Hours 8.00 Line Total \$226.96

Work Order 11-003076 COMPLETE DEFERRED MAINTENCE, OPEN TO CARPENTERS. Phase 004 PAINTERS PAINT ROOMS Action Taken

Leave Leave Code

Timecard Totals Non-Leave Hours 26.00 Leave Hours 2.00 Total Hours 28.00

4. Type a description in the **Description** field.
5. Click on the **Done** icon and the following screen will be displayed. Repeat steps 3-5 as needed.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Timecard View: Select

Transaction **51439** Editor SREL Edit Date Sep 21, 2010 11:15 AM Status Not Posted

Description

Shop Person JAPADILL JOHN PADILLA Work Date Sep 17, 2010

Total Hours Non-Leave Hours 26.00 Leave Hours 2.00 Total Hours 28.00

Total Cost Original Cost \$756.34 Adjusted Cost \$0.00 Total Cost \$756.34

Line Items

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8.00	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	

6. Click on the **Save** icon and the following screen will be displayed.

Hello, SREL
[Logout](#)
About
Help

Timecard
View:
?

Transaction

51439

Editor

SREL

Status

Not Posted

Description

Edit Date

Sep 21, 2010 11:15 AM

Shop Person

JAPADILL

JOHN PADILLA

Work Date

Sep 17, 2010

Total Hours

Non-Leave Hours

26.00

Leave Hours

2.00

Total Hours

28.00

Total Cost

Original Cost

\$756.34

Adjusted Cost

\$0.00

Total Cost

\$756.34

Line Items

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	

7. Click on the **Print** icon to print the *Timecard*.

The Adding Descriptions to Timecards process is now complete!

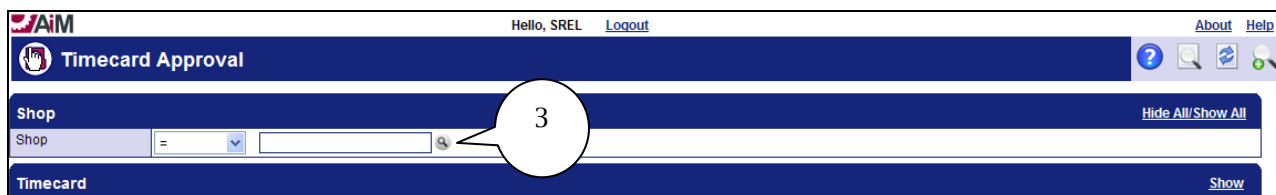
Timecard Approval

After employees have entered their time through *Rapid Time Entry*, *Timecards* must be reviewed by the supervisor for approval, or rejection if the employee needs to make corrections to the *Timecard*, by completing the following steps.

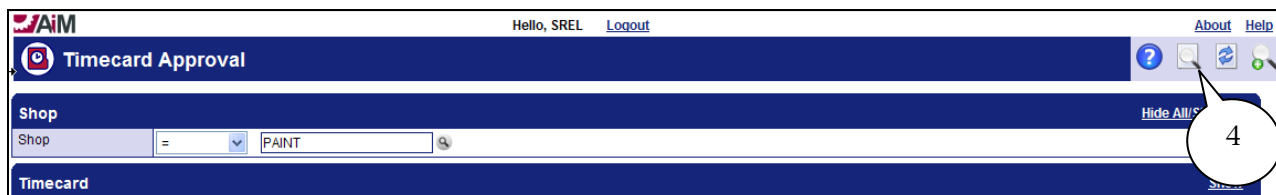
1. Select the **Time Management** module and the following will be displayed.



2. Click on **Timecard Approval** and the following screen will be displayed.



3. Click on the **Shop Zoom** icon to conduct a *Search* of *Timecards* waiting for approval, select the appropriate **Shop**, and the following screen will be displayed.



4. Click on the **Execute Search** icon, or use the *Search* feature described in the *Performing a Search Query* section to narrow the *Search* to a specific *Shop*, and the following screen will be displayed.

Timecard Approval

Select All Less Detail [More Detail](#)

Shop Person	Name	Total Days	Total Hours
AVARELA	HECTOR VARELA	1	8.00
CZAP	ISAAC PAZ	1	8.00
JAPADILL	JOHN PADILLA	2	39.50
RLIMON	RANDALL LIMON	1	8.00
RMADERO	RUBEN MADERO	1	8.00
TONYM	ANTHONY MONTES	1	8.00

5. Click on the **More Detail** link and the following screen will be displayed.

Timecard Approval

Select All [Less Detail](#) [More Detail](#)

Shop Person	Name	Total Days	Total Hours															
AVARELA	HECTOR VARELA	1	8.00															
<table border="1"> <thead> <tr> <th>Work Date</th> <th>Transaction</th> <th>Non-Leave Hours</th> <th>Leave Hours</th> <th>Total Hours</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 08/23/2010</td> <td>51390</td> <td></td> <td>0.00</td> <td>8.00</td> </tr> </tbody> </table>				Work Date	Transaction	Non-Leave Hours	Leave Hours	Total Hours	<input type="checkbox"/> 08/23/2010	51390		0.00	8.00					
Work Date	Transaction	Non-Leave Hours	Leave Hours	Total Hours														
<input type="checkbox"/> 08/23/2010	51390		0.00	8.00														
CZAP	ISAAC PAZ	1	8.00															
<table border="1"> <thead> <tr> <th>Work Date</th> <th>Transaction</th> <th>Non-Leave Hours</th> <th>Leave Hours</th> <th>Total Hours</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 08/23/2010</td> <td>51394</td> <td>8.00</td> <td>0.00</td> <td>8.00</td> </tr> </tbody> </table>				Work Date	Transaction	Non-Leave Hours	Leave Hours	Total Hours	<input type="checkbox"/> 08/23/2010	51394	8.00	0.00	8.00					
Work Date	Transaction	Non-Leave Hours	Leave Hours	Total Hours														
<input type="checkbox"/> 08/23/2010	51394	8.00	0.00	8.00														
JAPADILL	JOHN PADILLA	2	39.50															
<table border="1"> <thead> <tr> <th>Work Date</th> <th>Transaction</th> <th>Non-Leave Hours</th> <th>Leave Hours</th> <th>Total Hours</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 09/17/2010</td> <td>51439</td> <td>26.00</td> <td>2.00</td> <td>28.00</td> </tr> <tr> <td><input type="checkbox"/> 09/30/2010</td> <td>51442</td> <td>11.50</td> <td>0.00</td> <td>11.50</td> </tr> </tbody> </table>				Work Date	Transaction	Non-Leave Hours	Leave Hours	Total Hours	<input type="checkbox"/> 09/17/2010	51439	26.00	2.00	28.00	<input type="checkbox"/> 09/30/2010	51442	11.50	0.00	11.50
Work Date	Transaction	Non-Leave Hours	Leave Hours	Total Hours														
<input type="checkbox"/> 09/17/2010	51439	26.00	2.00	28.00														
<input type="checkbox"/> 09/30/2010	51442	11.50	0.00	11.50														

6. To review the employee's *Timecard*, click on the **Work Date Transaction** number and the following *Timecard* will be displayed.

7. After reviewing the *Timecard*, click on the **Done** icon and the *Timecard Approval* screen will be reappear. Repeat steps 6 and 7 to review additional *Timecards*.

8. To *Approve* or *Reject* a *Timecard* for a **Shop Person**, click on the box next to the **Work Date** and a check mark will appear in the box.
9. More than one *Timecard* can be selected (step 8), or all *Timecards* waiting for approval can be selected, as long as they require the same action (approval or rejection), by clicking on the box next to the **Shop Person** name.
10. Click on the **Approve** icon, or if changes need to be made by the employee, click on the **Reject** icon. The following screen, in this case showing a *Timecard* was approved, will be displayed.



11. Click on the **Done** icon. Repeat 6-11 to *Approve/Reject* additional *Timecards*.

Note: Employees should create a *Personal Query* link on their AiM *Work Desk* to alert them of *Timecard Rejections*.

The Timecard Approval process is now complete!

Material Requests

All materials (*Parts*) used to complete *Work Orders* must be recorded through *Material Requests*. Materials are obtained either through the OFS main warehouse or a shop warehouse.

Note: When processing a Material Request a Part # or Part name will be required. Consider performing a search before starting to create the Material Request. This can be completed by going to the *Inventory Module* and clicking on the *Search* icon next to the *Inventory Part Profile*. With the *Search* screen displayed, click on the *Zoom* icon on the *Class*, select the desired *Class* and *execute search*. This will expedite the process.

The followings steps must be completed to request materials.

After logging on the AiM **WorkDesk** will be displayed.



1. Click on **Work Management** and the following screen will be displayed.



2. Click on **Material Request** and the following screen will be displayed.

The screenshot shows the 'Material Request' form in the AiM system. The form is divided into several sections: Transaction, Requestor, Location, and Line Items. A callout bubble with the number 3 points to the 'New' icon (a plus sign) in the top right corner of the form.

3. Click on the **New** icon and the following screen will be displayed.

The screenshot shows the 'Material Request' form after clicking the 'New' icon. The form is now populated with default values. Callout bubble 4 points to the 'Description' field, and callout bubble 5 points to the 'Work Order' and 'Phase' fields.

4. Type in a description of the materials being requested, and the purpose/reason for the request in the **Description** field.
5. Enter work order and phase in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.

Note: The *Location* block fields will automatically populate after selecting a *Work Order* and *Phase*.

Material Request

Transaction: **14413** Editor: SREL Edit Date: Sep 23, 2010 08:56 AM

Status: **ENTERED**

Total: \$0.00

Work Order

Work Order: Phase: Shop:

Requestor

Requested By: Date Needed: Deliver To:

Location

University: Campus: Property: Location or Room:

Line Items

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
------	-----------	----------------	-------------	-----	----------	-----------	----------	--------

6. Enter employee *Username* in the **Requested By** field then click the **Zoom** icon which will populate the **Requested By** and **Deliver To** fields if the *Username* is correct. Or Click on **Zoom** icon and select the **Shop Person** requesting the material.
7. Click on the calendar icon to select the **Date Needed**.
8. **Status** field should default to *Entered*. If not, click on **Zoom** icon and select **Entered** from the **Status** column.
9. Click on the **Add Line Item** icon and the following drop down list will be displayed.

Add New Line Item

Line Item Type

Please Select:

☒ Add Stock Part by Warehouse

☐ Add Catalog Part by Vendor

☐ Add NonStock Part

☐ Add Equipment Rental

Next

10. Click on **Add Stock Part by Warehouse** radio button.
- Note:** Do not ever select *Add NonStock Part* radio button.
11. Click on the **Next** icon and the following screen will be displayed.

The screenshot shows the 'Line Item' form in the AiM system. The top header includes the AiM logo, user name 'Hello, SREL', and a 'Logout' link. The form is divided into several sections: 'Line' (Line 1), 'Description', 'Part' (Warehouse, Part, Class, Commodity, Green), 'Totals' (Quantity, Unit Cost, Total), and 'Status' (Open, Line Type: Stock). Callout 12 points to the 'Warehouse' field, and callout 13 points to the 'Part' field.

12. Click on the **Warehouse Zoom** icon and select the appropriate **Warehouse**.
13. To locate the **Part** (material) being ordered, click on the **Zoom** icon and perform a **Search** as described in the **Search Query** section. After selecting the **Part**, the following screen will be displayed.

Note: The *Description* and *Commodity* fields populate when you select the *Part*.

The screenshot shows the 'Line Item' form after selecting a part. The 'Description' field now contains 'PAINT THINNER PAINT'. The 'Part' section shows 'Warehouse: MAIN', 'Part: 3773', 'Class: MAIN WAREHOUSE', 'Commodity: Paints Remover', and 'Green: No'. The 'Totals' section shows 'Quantity' (empty), 'Unit Cost: \$0.0000', and 'Total: \$0.00'. Callout 14 points to the 'Quantity' field, and callout 15 points to the 'Done' icon in the top right corner.

14. Enter a **Quantity** (how many) of the **Part** (material) being requested.
15. Click on the **Done** icon and the following screen will be displayed

Material Request

Transaction: **14414** Editor: SREL Edit Date: Sep 23, 2010 09:59 AM Status: **ENTERED** Total: \$0.00

Description: PAINT TO REMOVE GRAFFITI ON WALLS

Work Order
 Work Order: **PRJFEE-1209**
 PAINTING ART GALLERY
 Phase: **PRJFEE-1209**
 NEED ESTIMATE FOR PAINTING ART GALLERY IN
 Shop: **PROJECT DEVELOPMENT**
 F00470:PROJECT DEVELOPMENT SHOP

Requestor
 Requested By:
 Date Needed: **30 Sep 2010**
 Deliver To:

Location
 University: **NMSU**
 NEW MEXICO STATE UNIVERSITY
 Campus: **LAS CRUCES**
 LAS CRUCES
 Property: **285**
 CORBETT CENTER
 Location or Room:

Line Items

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	2545	PAINT THINNER PAINT	EA	0.0000	\$33.9600	\$0.00	Open

16. Additional materials can be requested by clicking on the **Add Line Item** icon once for each *Part* being requested, and repeating steps 11-15.
17. Click on the **Save** icon and the request will be sent for supervisor approval. The following screen will be displayed.

Material Request

Transaction: **14414** Editor: SREL Edit Date: Sep 23, 2010 10:34 AM Status: **ENTERED** Total: \$0.00

Description: PAINT TO REMOVE GRAFFITI ON WALLS

Work Order
 Work Order: **PRJFEE-1209**
 PAINTING ART GALLERY
 Phase: **PRJFEE-1209**
 NEED ESTIMATE FOR PAINTING ART GALLERY IN
 Shop: **PROJECT DEVELOPMENT**
 F00470:PROJECT DEVELOPMENT SHOP

Requestor
 Requested By:
 Date Needed: **Sep 30, 2010**
 Deliver To:

Location
 University: **NMSU**
 NEW MEXICO STATE UNIVERSITY
 Campus: **LAS CRUCES**
 LAS CRUCES
 Property: **285**
 CORBETT CENTER
 Location or Room:

Line Items

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	2545	PAINT THINNER PAINT	EA	0.0000	\$33.9600	\$0.00	Open

18. Click on the **Print** icon to print a copy of the *Material Request*.

The Material Request process is now complete!

Equipment Requests

Equipment Requests are initiated in the same fashion as *Material Requests* by completing the following steps which begins after *Add Line Item* for a *Material Request*.

1. Click on **Add Equipment Rental** radio button.
2. Click on the **Next** icon and the following screen will be displayed.

3. Type in a description of the equipment being requested, and the purpose/reason for the request in the **Description** field.
4. Click on the **Equipment Group Zoom** icon and the following screen will be displayed.

5. Click on the **Execute Search** icon and the following screen will be displayed.

Equipment Group	Description
AERIAL LIFTS - T1	MAN LIFTS, SISSOR LIFT, BUCKET TRUCK
AERIAL LIFTS - T2	MAN LIFTS, SISSOR LIFT, BUCKET TRUCK
AIR COMPRESSORS	LARGE TRAILER MOUNTED AIR COMPRESSORS USED TO RUN INDUSTRIAL AIR TOOLS SUCH AS JACK HAMMERS
ASSIGNED TOOLS	TOOLS THAT ARE ASSIGNED TO AN INDIVIDUAL
COMPACTION	RO... VIBRATING SOIL COMPACTORS
CRANES	
EARTHMOVING/TRENCHING-T1	BOBCAT
EARTHMOVING/TRENCHING-T2	BOBCAT ATTACHMENTS; KUBOTA TRACTOR
EARTHMOVING/TRENCHING-T3	BACKHOE
EARTHMOVING/TRENCHING-T4	BOBCAT ATTACHMENTS INCLUDED IN RENTAL

6. Select the appropriate **Equipment Group** item and the following screen will be displayed.

Line	Editor	Status	Line Type
1	SREL	Open	Rental

Rental Detail		Totals	
Equipment Group	AERIAL LIFTS - T1	Quantity	1
Pick-Up Date	30 Sep 2010	Rate Type	DAILY
Pick-Up Time	8:00 AM	Rate	\$190.00
Return Date	30 Sep 2010	Unit Cost	\$0.0000
Return Time	4:00 PM	Total	\$0.00

7. Complete the **Rental Detail** block by clicking on the calendars to select **Pick-Up** and **Return Dates**, and by entering times for **Pick Up** and **Return** and selecting **AM** or **PM** (click on arrows).
8. Enter the **Quantity** (how many) being requested.

9. Click on the **Rate Type Zoom** icon and make appropriate selection.
10. **Status** should default to **Open**. If not, click on the arrow and select **Open**.
11. Click on the **Done** icon and the following screen will be displayed.

Material Request

Transaction: **14417** Editor: SREL Edit Date: Sep 23, 2010 01:24 PM Status: **ENTERED** Total: \$0.00

Description: FORK LIFT

Work Order
 Work Order: **PRJFEE-1209**
 PAINTING ART GALLERY
 Phase: **PRJFEE-1209**
 NEED ESTIMATE FOR PAINTING ART GALLERY IN
 Shop: **PROJECT DEVELOPMENT**
 F00470:PROJECT DEVELOPMENT SHOP

Requestor
 Requested By: **BROBERT**
 ROBERT BILBAO
 Date Needed: **30 Sep 2010**
 Deliver To: **BROBERT**
 ROBERT BILBAO

Location
 University: **NMSU**
 NEW MEXICO STATE UNIVERSITY
 Campus: **LAS CRUCES**
 LAS CRUCES
 Property: **285**
 CORBETT CENTER
 Location or Room:

Line Items

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Rental	AERIAL LIFTS - T1	EAGLE LIFT		1.0000	\$63.3300	\$63.33	Open

12. Click on the **Save** icon and the following screen will be displayed.

Material Request

Transaction: **14417** Editor: SREL Edit Date: Sep 23, 2010 02:04 PM Status: **ENTERED** Total: \$63.33

Description: FORK LIFT

Work Order
 Work Order: **PRJFEE-1209**
 PAINTING ART GALLERY
 Phase: **PRJFEE-1209**
 NEED ESTIMATE FOR PAINTING ART GALLERY IN
 Shop: **PROJECT DEVELOPMENT**
 F00470:PROJECT DEVELOPMENT SHOP

Requestor
 Requested By: **BROBERT**
 ROBERT BILBAO
 Date Needed: **Sep 30, 2010**
 Deliver To: **BROBERT**
 ROBERT BILBAO

Location
 University: **NMSU**
 NEW MEXICO STATE UNIVERSITY
 Campus: **LAS CRUCES**
 LAS CRUCES
 Property: **285**
 CORBETT CENTER
 Location or Room:

Line Items

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Rental	AERIAL LIFTS - T1	EAGLE LIFT		1.0000	\$63.3300	\$63.33	Open

13. Click on the **Print** icon to print a copy of the *Equipment Request*.

The Equipment Request process is now complete!

Material/Equipment Request Approval

Material and *Equipment Requests* must be approved by the supervisor by completing the following steps. This example is for material from a *Shop Warehouse*.

After logging on the AiM **WorkDesk** will be displayed.



1. Click on **Work Management** and the following screen will be displayed.



2. Click on **Material Request** and the following screen will be displayed.

3. Click on the **Search** icon and the following screen will be displayed.

4. Click on the **Shop Zoom** icon and the following screen will be displayed.

Shop	
Shop	Description
CARPENTRY	F00456:CARPENTRY SHOP
CONSTRUCTION	F00472:CONSTRUCTION SHOP
CUP	F00457:CENTRAL UTILITY PLANT
CUSTODIAL	F00458:CUSTODIAL SHOP
ELECTRIC	F00459:ELECTRIC SHOP
ENERGY MGMT	500650:ENERGY MANAGEMENT SYSTEMS
ENGINEERING	F00462:ENGINEERING SHOP
GROUNDS	F00463:GROUNDS SHOP
HEAVY EQUIPMENT	500617:HEAVY EQUIPMENT
HEAVY EQUIPMENT FUEL	500617: HEAVY EQUIPMENT

5. Click on the appropriate **Shop** and the following screen will be displayed. Use the *Page Navigation (DVD)* buttons at the bottom of the screen to look for additional *Shops*.


Hello, SREL Logout		About Help
Material Request		
Transaction	-	=
Description	-	=





6. Click on the **Execute Search** icon and the following screen will be displayed.

AIM

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[About](#) [Help](#)

 **Material Request**

Transaction	Work Order	Phase	Date Needed	Placed By	Status	University	Campus	Property	Location or Room	Location ID	Shop Person
10007	10-006005	003	Jun 09, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	366			CASJOSEP
10009	10-011513	PAINT	Jun 09, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	221			CASJOSEP
10025	10-006005	003	Jun 09, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	366			CASJOSEP
10031	10-009438	002	Jun 09, 2010	RMADERO	CLOSED	NMSU	LAS CRUCES	536			RMADERO
10035	10-011513	001	Jun 09, 2010	JANNET	CLOSED	NMSU	LAS CRUCES	184			JANNET
10054	10-011513	PAINT	Jun 10, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	221			CASJOSEP
10059	10-011780	001	Jun 10, 2010	FREDROD	CLOSED	NMSU	LAS CRUCES	184			FREDROD
10079	10-011608	001	Jun 10, 2010	JAPADILL	CLOSED	NMSU	LAS CRUCES	187	W156	W156*1	JAPADILL
10134	10-012013	001	Jun 10, 2010	CZAP	CLOSED	NMSU	LAS CRUCES	288	201	201*1	CZAP
10152	10-011608	001	Jun 10, 2010	JAPADILL	CLOSED	NMSU	LAS CRUCES	187	W156	W156*1	JAPADILL
10165	10-011513	PAINT	Jun 11, 2010	RPUEENT	CLOSED	NMSU	LAS CRUCES	221			RPUEENT
10179	10-012013	001	Jun 11, 2010	CZAP	CLOSED	NMSU	LAS CRUCES	288	201	201*1	CZAP

7. Click on the appropriate **Transaction** number and the following screen will be displayed.

Material Request View: Select

Transaction: **14423** Editor: SREL
Description: SAND PAPER Edit Date: Sep 27, 2010 01:33 PM

Status: **ENTERED**

Total: \$0.96

Work Order	Requestor	Location
Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Requested By: JAPADILL JOHN PADILLA	University: NMSU NEW MEXICO STATE UNIVERSITY
Phase: 001 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Date Needed: Sep 30, 2010	Campus: LAS CRUCES LAS CRUCES
Shop: PAINT F00468:PAINT SHOP	Deliver To: JAPADILL JOHN PADILLA	Property: 187 CHEMISTRY BUILDING
		Location or Room: 034 POST DOC OFFICE

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

8. Click on the **Edit** icon and the following screen will be displayed.

Material Request View: Select

Transaction: **14423** Editor: SREL
Description: SAND PAPER Edit Date: Sep 27, 2010 01:33 PM

Status: **ENTERED**

Total: \$0.96

Work Order	Requestor	Location
Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Requested By: JAPADILL JOHN PADILLA	University: NMSU NEW MEXICO STATE UNIVERSITY
Phase: 001 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Date Needed: 30 Sep 2010	Campus: LAS CRUCES LAS CRUCES
Shop: PAINT F00468:PAINT SHOP	Deliver To: JAPADILL JOHN PADILLA	Property: 187 CHEMISTRY BUILDING
		Location or Room: 034 POST DOC OFFICE

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

9. Click on the **Line Item** number to review the **Material Request**, including which warehouse the material was ordered from, and the following screen will be displayed.

Line Item

Line: 1

Description: PNT SANDING PAPER 3M 320A KWALS #2274600

Status: Open

Line Type: Stock

Warehouse: MAIN

Part: 9117

Class: UNKNOWN

Commodity: UNKNOWN

Green: No

Totals

Quantity: 1.0000

Unit Cost: \$0.9600

Total: \$0.96

10. In this example, the material will come from the *Main Warehouse* as reflected in the **Warehouse** field.

11. Click on the **Done** icon to return to the *Material Request* screen.

Material Request

Transaction: 14423

Description: SAND PAPER

Status: ENTERED

Total: \$0.96

Work Order

Work Order: 11-004636

Phase: 001

Shop: PAINT

Requestor

Requested By: JAPADILL

Date Needed: 30 Sep 2010

Deliver To: JAPADILL

Location

University: NMSU

Campus: LAS CRUCES

Property: 187

Location or Room: 034

Line Items

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

12. Click on the **Status Zoom** icon and the following screen will be displayed.

Material Request Status	
Status	Description
ENTERED	MATERIAL REQUEST HAS BEEN ENTERED
MAT-APPROVED	MATERIAL APPROVAL BY SUPERVISOR
RNT-APPROVED	RENTAL APPROVAL BY SUPERVISOR
SWH-APPROVED	APPROVED FOR THE SHOP WAREHOUSE
CANCEL	MATERIAL REQUEST HAS BEEN CANCELLED

13. Since this example is for a *Material Request* from a *Shop Warehouse*, to change the status click on *SWH-Approved* under the **Status** column and the following screen will be displayed.

Note: If the material was requested from the *Main Warehouse*, *Mat-Approved* would be selected from the *Status* column. For equipment requests, select *RNT-Approved* from the *Status* column.

The screenshot displays the 'Material Request' form in the AiM system. The transaction number is 14423, and the status is 'SWH-APPROVED'. The request is for 'SAND PAPER' with a total cost of \$0.96. The requestor is John Padilla, and the date needed is September 30, 2010. The location is NMSU, Las Cruces, Chemistry Building, Post Doc Office. The work order is 11-004636, and the phase is 001. The shop is PAINT. The line items table shows one item: PINT SANDING PAPER 3M 320A KWALS #2274600, with a quantity of 1.0000 and a unit cost of \$0.9600.

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PINT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

14. Click on the **Save** icon and the following screen will be displayed.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Material Request View: [Select](#)

Transaction	14423	Editor	SREL	Status	SWH-APPROVED
Description	SAND PAPER	Edit Date	Sep 27, 2010 02:48 PM	Total	\$0.96

Work Order	Requestor	Location
Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Requested By: JAPADILL JOHN PADILLA	University: NMSU NEW MEXICO STATE UNIVERSITY
Phase: 001 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Date Needed: Sep 30, 2010	Campus: LAS CRUCES LAS CRUCES
Shop: PAINT F00468:PAINT SHOP	Deliver To: JAPADILL JOHN PADILLA	Property: 187 CHEMISTRY BUILDING
		Location or Room: 034 POST DOC OFFICE

Line Items									
Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status	
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open	

15. Click on the **Print** icon to print a copy of the approved *Material Request*.

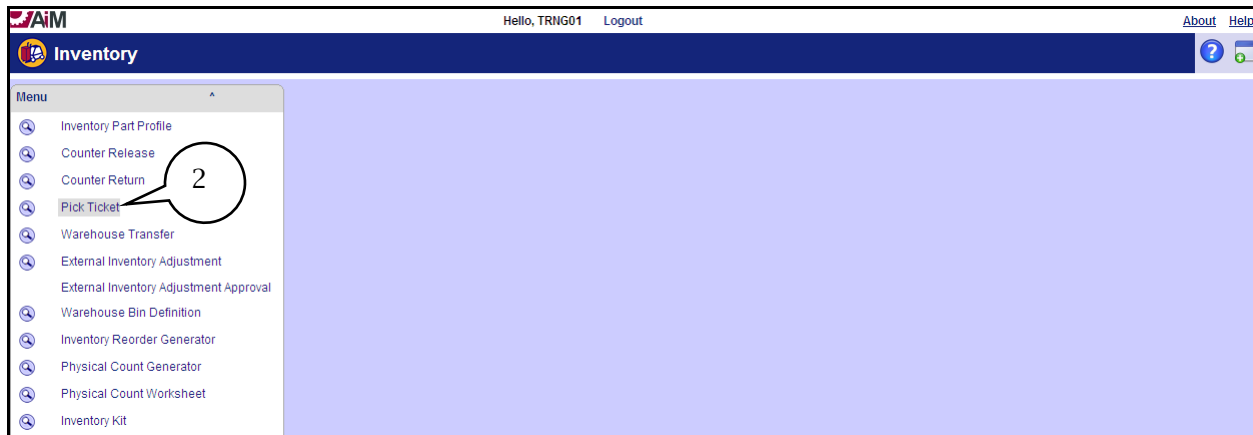
The Material/Equipment Request Approval process is now complete!

Pick Ticket

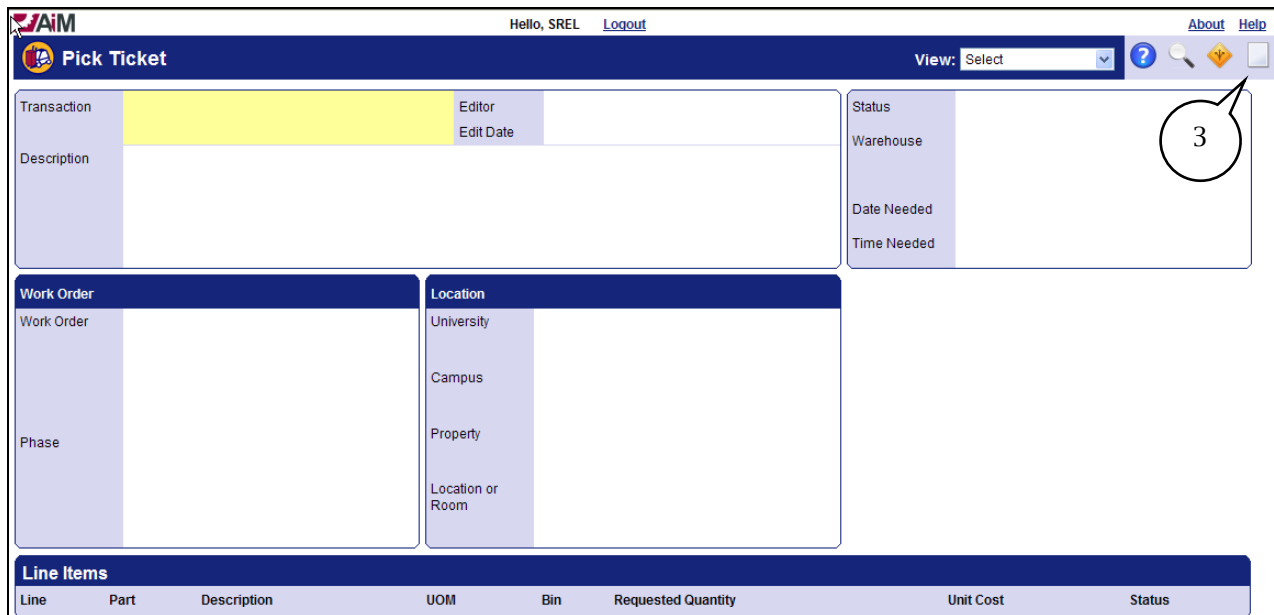
Whether for the *Main Warehouse* or *Shop Warehouse*, after material/equipment requests have been approved in the AiM system the following steps must be completed for inventory tracking purposes. This example will be for a *Shop Warehouse*.



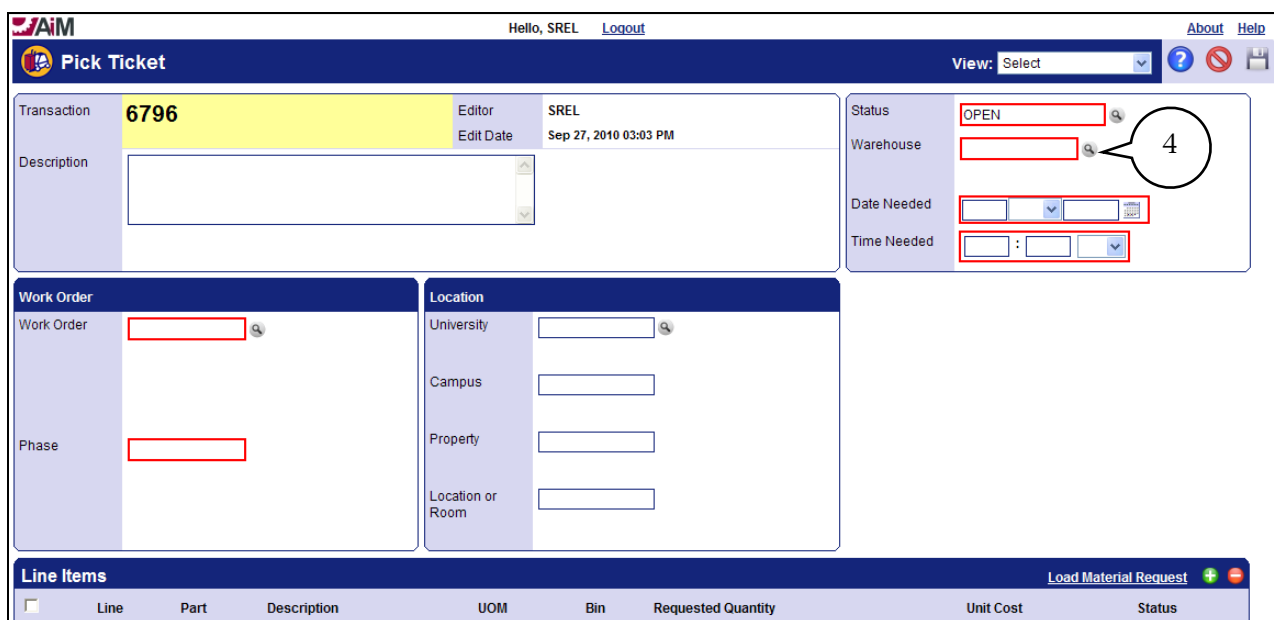
1. Select the **Inventory** module and the following will be displayed.



2. Click on **Pick Ticket** and the following screen will be displayed.



3. Click on the **New** icon and the following screen will be displayed.



4. Click on the **Warehouse** icon and the following screen will be displayed.

Warehouse	Description
PAINT	PAINT WAREHOUSE

- Select the appropriate **Warehouse**, in this example *Paint*, and the *Pick Ticket* screen will reappear.

Transaction: **6797** Editor: SREL Edit Date: Sep 27, 2010 03:07 PM

Description:

Status: Warehouse: Date Needed: Time Needed:

Work Order: Location: University: Campus: Property: Location or Room:

Line Items: [Load Material Request](#)

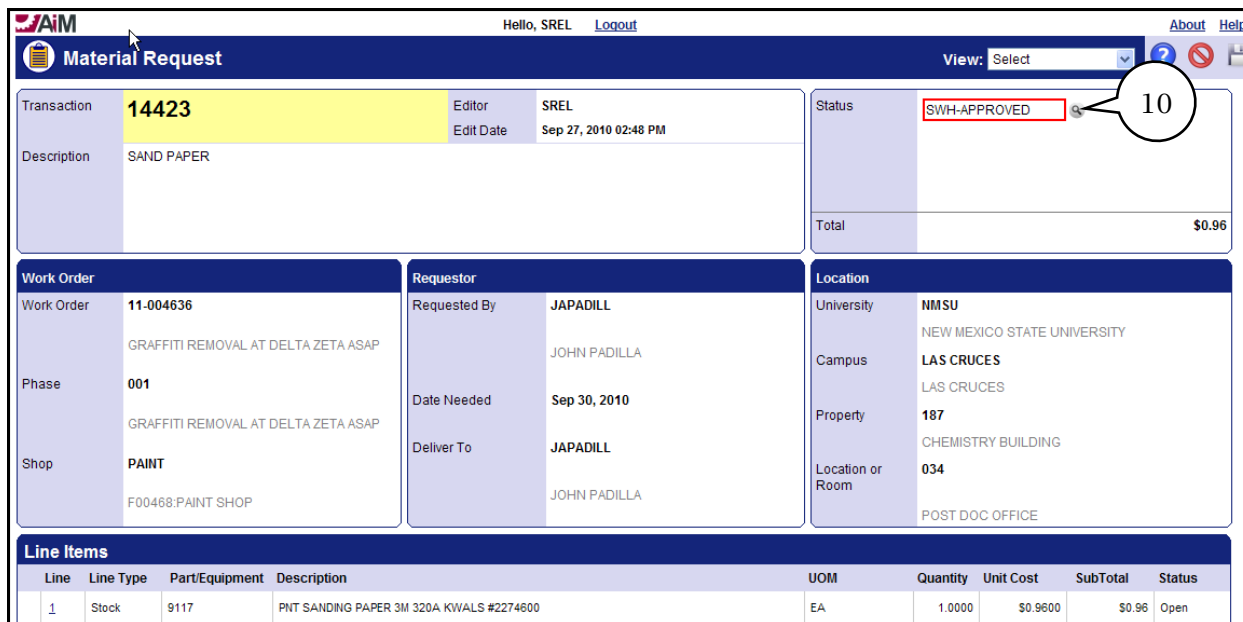
Line	Part	Description	UOM	Bin	Requested Quantity	Unit Cost	Status

- Click on the **Load Material Request** icon and the following screen will be displayed.

Transaction	Line	Warehouse	Work Order	Phase	Part	Quantity	Status
11077	16	MAIN	10-013093	001	2784	1.0000	Open
<input type="checkbox"/> 11077		MAIN	10-013093	001	2756	5.0000	Open
<input type="checkbox"/> 11128		MAIN	10-012767	001	2246	1.0000	Open
<input type="checkbox"/> 11436	1	MAIN	10-005251	001	4101	100.0000	Open

- Click on the **Transaction** number(s) to review the *Material Request*, then click on the **Done** icon to return to the *Pick Ticket* screen.
- To select items for the *Pick Ticket*, click on the box(s) next to the desired **Transaction** number(s) and a check mark will appear in the box(s).
- Click on the **Done** icon and the following screen will be displayed.

Note: When the *Done* icon was clicked, all required fields on the *Pick Ticket* screen automatically populate.



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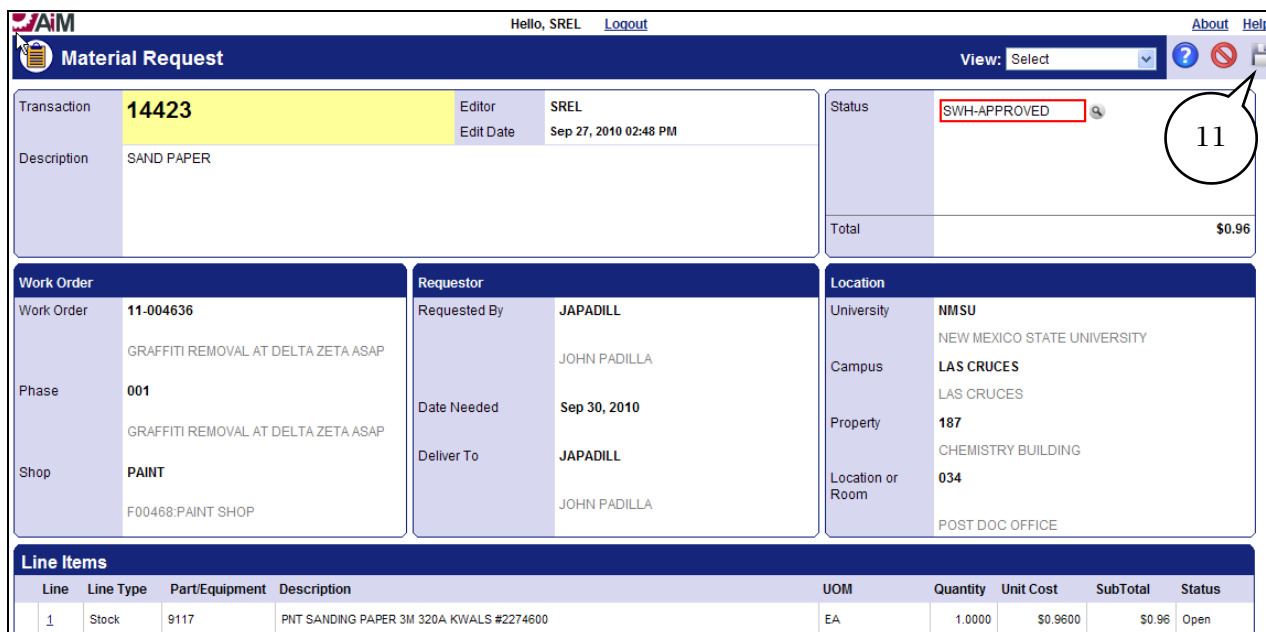
Material Request View: Select

Transaction	14423	Editor	SREL	Status	SWH-APPROVED
Description	SAND PAPER	Edit Date	Sep 27, 2010 02:48 PM	Total	\$0.96

Work Order	Requestor	Location
Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Requested By: JAPADILL JOHN PADILLA	University: NMSU NEW MEXICO STATE UNIVERSITY
Phase: 001 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Date Needed: Sep 30, 2010	Campus: LAS CRUCES LAS CRUCES
Shop: PAINT F00468:PAINT SHOP	Deliver To: JAPADILL JOHN PADILLA	Property: 187 CHEMISTRY BUILDING
		Location or Room: 034 POST DOC OFFICE

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

10. Click on the **Status** icon and the following screen will be displayed.



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Material Request View: Select

Transaction	14423	Editor	SREL	Status	SWH-APPROVED
Description	SAND PAPER	Edit Date	Sep 27, 2010 02:48 PM	Total	\$0.96

Work Order	Requestor	Location
Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Requested By: JAPADILL JOHN PADILLA	University: NMSU NEW MEXICO STATE UNIVERSITY
Phase: 001 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Date Needed: Sep 30, 2010	Campus: LAS CRUCES LAS CRUCES
Shop: PAINT F00468:PAINT SHOP	Deliver To: JAPADILL JOHN PADILLA	Property: 187 CHEMISTRY BUILDING
		Location or Room: 034 POST DOC OFFICE

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

11. Click on the **Save** icon and the following screen will be displayed.

Hello, SREL [Logout](#)
[About](#) [Help](#)

Material Request
View:

Transaction

14423

Editor

SREL

Edit Date

Sep 27, 2010 04:02 PM

Description

SAND PAPER

Status

[SWH-APPROVED](#)

Total

\$0.96

Work Order

Work Order

11-004636

GRAFFITI REMOVAL AT DELTA ZETA ASAP

Phase

001

GRAFFITI REMOVAL AT DELTA ZETA ASAP

Shop

PAINT

F00468:PAINT SHOP

Requestor

Requested By

JAPADILL

JOHN PADILLA

Date Needed

Sep 30, 2010

Deliver To

JAPADILL

JOHN PADILLA

Location

University

NMSU

NEW MEXICO STATE UNIVERSITY

Campus

LAS CRUCES

LAS CRUCES

Property

187

CHEMISTRY BUILDING

Location or Room

034

POST DOC OFFICE

Line Items

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

12. Click on the **Print** icon to print a copy of the *Pick Ticket*.

The Pick Ticket process is now complete!

Counter Release

Whether for the *Main Warehouse* or *Shop Warehouse*, after material/equipment requests have been approved and a *Pick Ticket* has been completed, a *Counter Release* is completed when the employee picks up the material or equipment. The following steps must be completed for a *Counter Release*; in this example to release material from a *Shop Warehouse*.



1. Select the **Inventory** module and the following will be displayed.



2. Click on **Counter Release** and the following screen will be displayed.

Counter Release

Transaction: [Yellow Highlighted Field] Editor: [Field] Edit Date: [Field]

Description: [Field]

Reference Number: [Field] Warehouse: [Field] Total Cost: \$0.00

Release Persons

Released By: [Field] Released To: [Field]

Line Items

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket

3. Click on the **New** icon and the following screen will be displayed.

Counter Release

Transaction: **13276** Editor: SREL Edit Date: Sep 28, 2010 02:39 PM

Description: [Field]

Reference Number: [Field] Warehouse: [Field] Total Cost: \$0.00

Release Persons





Released By: [Field] Released To: [Field]

Default Work Order: [Field]


Line Items

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket

4. Click on the **Warehouse** icon and the following screen will be displayed.

Warehouse		   	
Warehouse	Description		
CARPENTRY	CARPENTRY WAREHOUSE		
CONSTRUCTION	CONSTRUCTION WAREHOUSE		
ELECTRIC	ELECTRIC WAREHOUSE		
GROUNDS	GROUNDS WAREHOUSE		
HVAC	HVAC WAREHOUSE		
LOCKSHOP	LOCKSHOP WAREHOUSE		
MAIN	MAIN WAREHOUSE		
MECHANICS	MECHANICS WAREHOUSE		
PAINT	PAINT WAREHOUSE		
PLUMBING	PLUMBING WAREHOUSE		

5. Click on the appropriate **Warehouse** and the following screen will be displayed.

 Hello, SREL Logout About Help																			
Counter Release View: Select																			
Transaction: 13276 Description: <input type="text"/>	Editor: SREL Edit Date: Sep 28, 2010 02:39 PM																		
Reference Number: <input type="text"/> Warehouse: PAINT (PAINT WAREHOUSE) Total Cost: \$0.00																			
Release Persons Released By: <input type="text"/> Released To: <input type="text"/>																			
Default Work Order: <input type="text"/>																			
Line Items Load Pick Tickets																			
<table border="1"> <thead> <tr> <th>Line</th> <th>Part</th> <th>Description</th> <th>Bin</th> <th>Release Quantity</th> <th>Return Quantity</th> <th>Work Order</th> <th>Phase</th> <th>Pick Ticket</th> </tr> </thead> <tbody> <tr> <td colspan="9"> </td> </tr> </tbody> </table>		Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket									
Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket											

6. Click on the **Load Pick Ticket** icon and the following screen will be displayed.

Transaction	Line	Work Order	Phase	Part	Bin	Requested Quantity	Released Quantity
5260	5	10-012317	005	2416	OS-C:2416	3.0000	0.0000
5260	9	10-012317	005	2421	OS-C:2421	2.0000	0.0000
5316	1	10-013103	002	1855	34-E2:1855	1.0000	0.0000

- Click on the **Transaction** number(s) to review the *Pick Ticket*, then click on the **Done** icon to return to the *Counter Release* screen.

Transaction	Line	Work Order	Phase	Part	Bin	Requested Quantity	Released Quantity
5260	5	10-012317	005	2416	OS-C:2416	3.0000	0.0000

- To select desired transaction, click on the box next to the desired **Transaction** number(s) and a check mark will appear.
- Click on the **Done** icon and the following screen will be displayed.

Transaction: **13280** Editor: SREL Edit Date: Sep 28, 2010 03:06 PM

Description: PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN

Reference Number:

Warehouse: MAIN MAIN WAREHOUSE

Total Cost: \$24.75

Release Persons

Released By: (Callout 10)

Released To:

Default Work Order:

Line Items

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket
1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260

- Click on the **Released By Zoom** icon and the following screen will be displayed.

Employee		
Employee ID	First Name	Last Name
ABELZ	ABEL	ZAPIEN
LEONARD	LEONARD	BANEGAS

11. Click on the appropriate **Employee ID** and the *Counter Release* screen will reappear.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Counter Release View: [Select](#) [?](#) [X](#) [Print](#)

Transaction: **13283** Editor: SREL
Edit Date: Sep 28, 2010 03:23 PM

Description: PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN

Reference Number:
Warehouse: **MAIN**
MAIN WAREHOUSE
Total Cost: **\$24.75**

Release Persons

Released By: [ABELZ](#) [?](#)
ABEL ZAPIEN

Released To: [?](#) **12**

Default Work Order: [?](#)

Line Items [Load Pick Tickets](#) [+](#) [-](#)

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket
1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260

12. Click on the **Released To Zoom** icon and select the appropriate **Shop Person**.
13. Click on the **Save** icon and the following screen will be displayed.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Counter Release View: [Select](#) [?](#) [X](#) [Print](#) [Email](#)

Transaction: **13283** Editor: SREL
Edit Date: Sep 28, 2010 03:28 PM

Description: PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN

Reference Number:
Warehouse: **MAIN**
MAIN WAREHOUSE
Total Cost: **\$24.75**

Release Persons

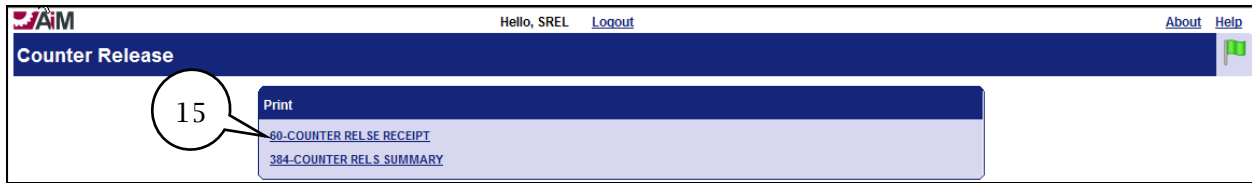
Released By: **ABELZ**
ABEL ZAPIEN

Released To: **JAPADILL**
JOHN PADILLA

Line Items

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket
1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260

14. Click on the **Print** icon and the following screen will be displayed.



15. Click on **60-Counter Relse Receipt** and the following screen will be displayed.

BIRT Report Viewer

Showing page 1 of 1

Counter Release 13283

Counter Release Receipt

Counter Release			
Description:	PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN		
Released By:	ABELZ (ABEL ZAPIEN)	Reference:	
Released To:	JAPADILL (JOHN PADILLA)	Warehouse:	MAIN (MAIN WAREHOUSE)
Release Date:	Sep 28, 2010 3:23 PM	Total Cost:	\$24.75

Line Items				
Line	Part:	2416 (PVC PIPE 1" BELL END SIERRA IRG)	Unit Cost:	\$8.25
	Bin:	OS-C-2416 (PVC PIPE 1" BELL END SIERRA IRG)	UOM:	EA
	Equipment:		Qty on Hand:	10.00
	Work Order:	10-012317 (PROVIDE NEW LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN (801))	Released Qty:	3.00
	Phase:	005 (PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN)	Returned Qty:	0.00
	Pick Ticket:	5260	Line Item:	5
			SubTotal:	\$24.75

Signature _____ Date _____

Sep 28, 2010 3:32 PM AiM™ Counter Release Receipt 13283 Page: 1

16. Click on the **Print Report** icon and the following screen will be displayed.

BIRT Report Viewer

Showing page 1 of 1

Counter Release 13283

Counter Release Receipt

Counter Release			
Description:	PROVIDE PLUMBING FOR LAB/OFF		
Released By:	ABELZ (ABEL ZAPIEN)		
Released To:	JAPADILL (JOHN PADILLA)		
Release Date:	Sep 28, 2010 3:23 PM		

Line Items				
Line	Part:	2416	Unit Cost:	\$8.25
	Bin:	OS-C	UOM:	EA
	Equipment:		Qty on Hand:	10.00
	Work Order:	10-012317 (PROVIDE NEW LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN (801))	Released Qty:	3.00
	Phase:	005 (PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN)	Returned Qty:	0.00
	Pick Ticket:	5260	Line Item:	5
			SubTotal:	\$24.75



Signature _____ Date _____

Sep 28, 2010 3:32 PM AiM™ Counter Release Receipt 13283 Page: 1

17. Click on the **PDF** radio button.

18. Click on the **OK** icon and the following screen will be displayed.

19

Counter Release
13283

Counter Release Receipt

Counter Release					
Description:	PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN				
Released By:	ABELZ (ABEL ZAPIEN)	Reference:			
Released To:	JAPADILL (JOHN PADILLA)	Warehouse:	MAIN (MAIN WAREHOUSE)		
Release Date:	Sep 28, 2010 3:23 PM	Total Cost:	\$24.75		
Line Items					
1	Line	Part:	2416 (PVC PIPE 1" BELL END SIERRA IRG)	Unit Cost:	\$8.25
	Bin:	OS-C:2416 (PVC PIPE 1" BELL END SIERRA IRG)		UOM:	EA
	Equipment:			Qty on Hand:	10.00
	Work Order:	10-012317 (PROVIDE NEW LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN (801))		Released Qty:	3.00
	Phase:	005 (PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN)		Returned Qty:	0.00
	Pick Ticket:	5260	Line Item:	5	SubTotal:

Signature _____ Date _____

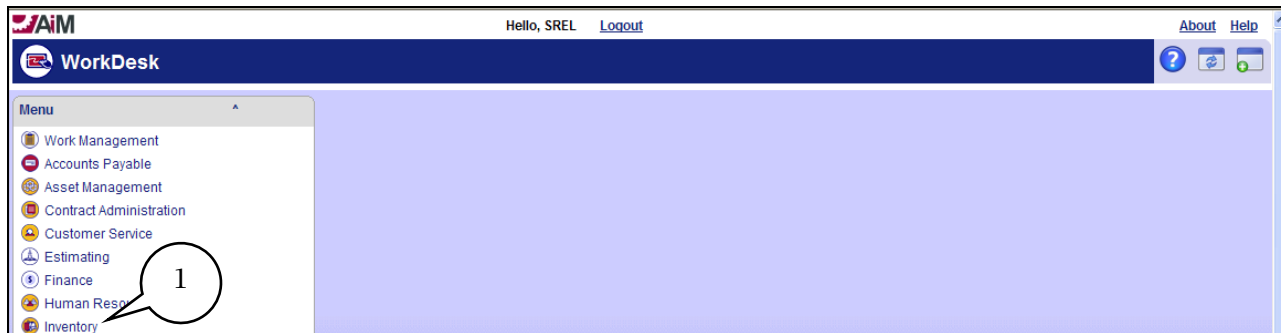
19. Click on the **Print** icon.

The Counter Release process is now complete!

Counter Return

The following steps must be completed to return materials that were not used for a *Work Order* to the warehouse. The following is an example of returning material to a *Shop Warehouse*.

After logging on, the Aim **WorkDesk** will be displayed.



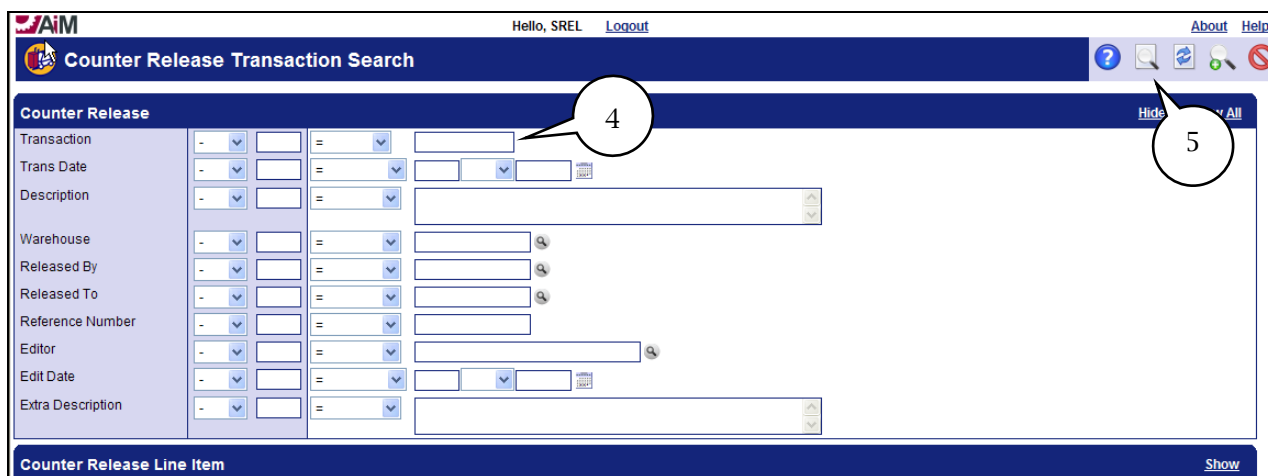
1. Select the **Inventory** module and the following drop down list will be displayed.



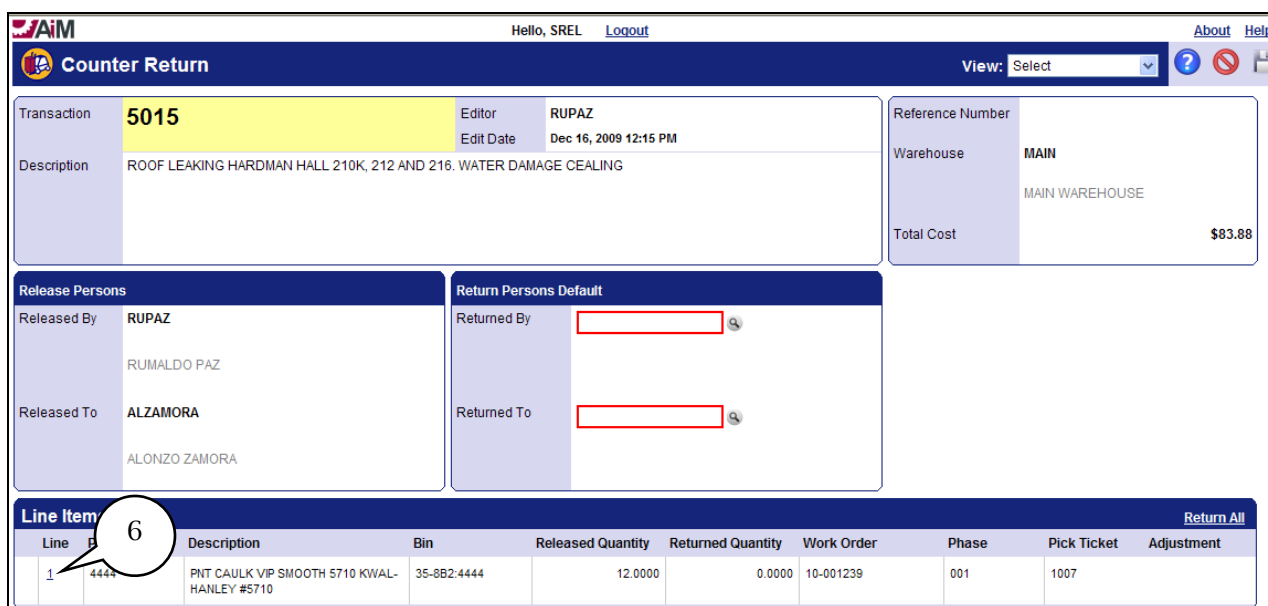
2. Click on **Counter Return** and the following screen will be displayed.

Line	Part	Description	Bin	Released Quantity	Returned Quantity	Work Order	Phase	Pick Ticket	Adjustment
------	------	-------------	-----	-------------------	-------------------	------------	-------	-------------	------------

3. Click on the **New** icon and the following screen will be displayed.



4. Type in a **Transaction** number or conduct a *Search* as described in the *Performing a Search Query* section.
5. Click the **Execute Search** icon, select the desired **Transaction**, and the following screen will be displayed.



Line	Description	Bin	Released Quantity	Returned Quantity	Work Order	Phase	Pick Ticket	Adjustment
1	PNT CAULK VIP SMOOTH 5710 KWAL-HANLEY #5710	35-8B2-4444	12.0000	0.0000	10-001239	001	1007	

6. Click on the **Line Item** number and the following screen will be displayed.

Counter Return Line Item

Item: **1** Editor: RUPAZ Original Transaction: 5015
 Edit Date: Dec 16, 2009 12:15 PM 4444

Part
 Part: 4444
 PNT CAULK VIP SMOOTH 5710 KWAL-HANLEY
 Bin: 35-8B2:4444
 UOM: EA
 Cost: \$6.9900
 Quantity on Hand: 155.0000

Work Order
 Work Order: 10-001239
 ROOF LEAKING HARDMAN HALL 210K, 212
 Phase: 001
 ROOF LEAKING HARDMAN HALL 210K, 212
 Release Quantity: 12.0000
 Prior Return Quantity: 0.0000
 Return Quantity: 0.0000

Return Persons
 Returned By: [Redacted]
 Returned To: [Redacted]

Asset
 Asset: [Redacted]

Equipment
 Equipment: [Redacted]

Pick Ticket
 Pick Ticket: 1007
 ROOF LEAKING HARDMAN HALL
 Line Item: 1

7. Enter a number in the **Return Quantity** field.
8. Click on the **Returned By Zoom** icon and select the appropriate **Employee ID**.
9. Click on the **Returned To Zoom** icon and select the appropriate **Employee ID**.
10. Click on the **Done** icon and the following screen will be displayed.

Counter Return

Transaction: **5015** Editor: RUPAZ
 Edit Date: Dec 16, 2009 12:15 PM

Description: ROOF LEAKING HARDMAN HALL 210K, 212 AND 216. WATER DAMAGE CEALING

Reference Number: [Redacted]
 Warehouse: MAIN
 MAIN WAREHOUSE
 Total Cost: \$83.88

Release Persons
 Released By: RUPAZ
 RUMALDO PAZ
 Released To: ALZAMORA
 ALONZO ZAMORA




Return Persons Default
 Returned By: JAPADILL
 Returned To: ABELZ

Line Items

Line	Part	Description	Bin	Released Quantity	Returned Quantity	Work Order	Phase	Pick Ticket	Adjustment
1	4444	PNT CAULK VIP SMOOTH 5710 KWAL-HANLEY #5710	35-8B2:4444	12.0000	1.0000	10-001239	001	1007	

11. Click on the **Save** icon and the following screen will be displayed.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Counter Return View: ?   

Transaction	5015	Editor	RUPAZ	Reference Number	
Description	ROOF LEAKING HARDMAN HALL 210K, 212 AND 216. WATER DAMAGE CEILING	Edit Date	Dec 16, 2009 12:15 PM	Warehouse	MAIN
				MAIN WAREHOUSE	
				Total Cost	\$76.89

Release Persons

Released By	RUPAZ
	RUMALDO PAZ
Released To	ALZAMORA
	ALONZO ZAMORA

Line Items

Line	Part	Description	Bin	Released Quantity	Returned Quantity	Work Order	Phase	Pick Ticket	Adjustment
2	4444	PNT CAULK VIP SMOOTH 5710 KWAL-HANLEY #5710	35-8B2:4444	12.0000	-1.0000	10-001239	001	1007	1

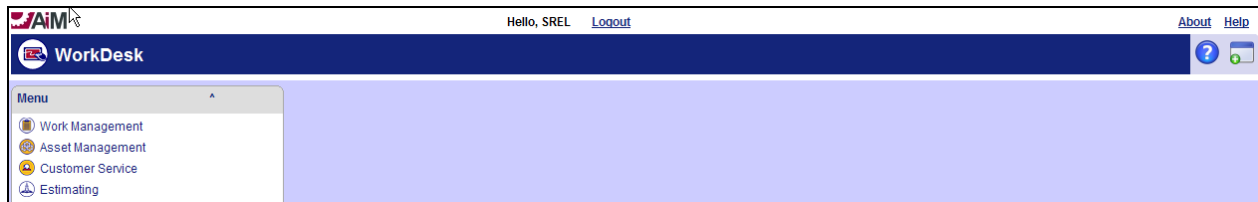
12. Click on the **Print** icon to print a copy of the *Counter Return*.

The Counter Return process is now complete!

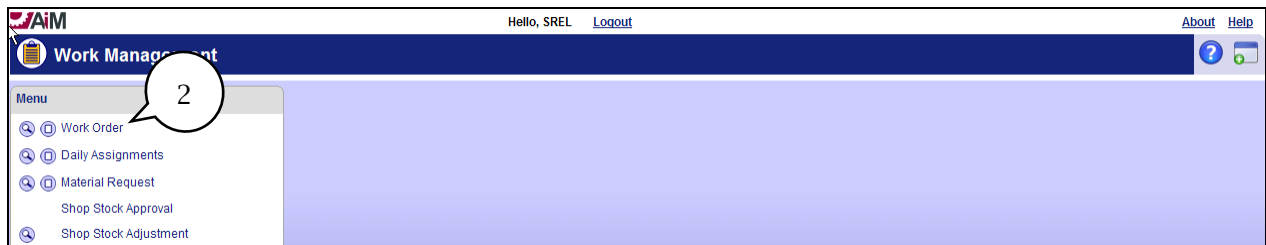
Creating a Work Order

There are times when OFS personnel, other than employees working the OFS Work Order desk, need to create a *Work Order* that is not initiated as the result of a *Customer Request*. The following steps must be completed to create a *Work Order*.

1. Select the **Work Management** module and the following list will be displayed.

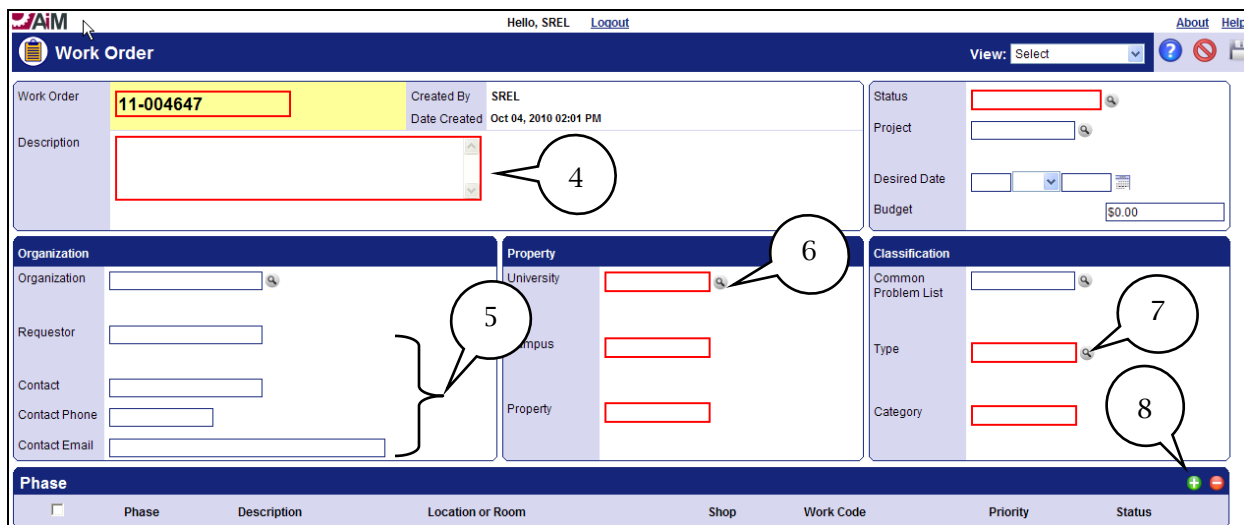


2. Click on **Work Order** and the following screen will be displayed.



3. Click on the **New** icon and the following screen will be displayed.

The screenshot shows the AiM Work Order form. The header bar includes the AiM logo, "Hello, SREL", "Logout", and "About" and "Help" links. Below the header is a dark blue bar with the "Work Order" title and a "View: Select" dropdown. A callout bubble with the number "3" points to the "New" icon (a yellow diamond) in the top right corner. The form is divided into several sections: "Work Order" (with fields for "Created By" and "Date Created"), "Description", "Status" (with a dropdown for "Project"), "Desired Date", "Budget", "Organization" (with fields for "Organization", "Requestor", "Contact", "Contact Phone", and "Contact Email"), "Property" (with fields for "University", "Campus", and "Property"), and "Classification" (with fields for "Common Problem List", "Type", and "Category"). At the bottom, there is a "Phase" section with a table header: "Phase", "Description", "Location or Room", "Shop", "Work Code", "Priority", and "Status".



The screenshot shows the 'Work Order' form in the AiM system. The form is divided into several sections: 'Work Order' (top left), 'Organization' (middle left), 'Property' (middle center), 'Classification' (middle right), and 'Phase' (bottom). Callouts are placed over specific fields: 4 points to the 'Description' field; 5 points to the 'Contact' fields (Name, Phone, Email); 6 points to the 'University', 'Campus', and 'Property' fields in the 'Property' section; 7 points to the 'Type' field in the 'Classification' section; and 8 points to the 'Category' field in the 'Classification' section. The 'Phase' section at the bottom has a table with columns: Phase, Description, Location or Room, Shop, Work Code, Priority, and Status. A green plus sign icon is visible in the bottom right corner of the 'Phase' section.

4. Type in a description of the work to be performed in the **Description** field.
5. Enter a **Contact** name, **Contact Phone**, and **Contact Email**.
6. Select the **University**, **Campus**, and **Property** by clicking on the **Zoom** icon. Use the **Search** feature to select the **Property**.

Note: Recommend selecting the word “contains” from the drop down list to the left of the **Description** field in the **Search** screen. Once the building name appears, select the desired number to populate the **Property** field. Initially, this is a drill down process; once familiar with the **Property** number it can be entered directly, then click on the **Zoom** icon to validate and populate the **Property** block fields.

7. Click on the **Type Zoom** icon and make a selection, then make a **Category** selection. After making these selections the **Status** field will populate to the **Open** status.
8. Click on the **Add Phase** (green plus sign) icon and the following screen will be displayed.

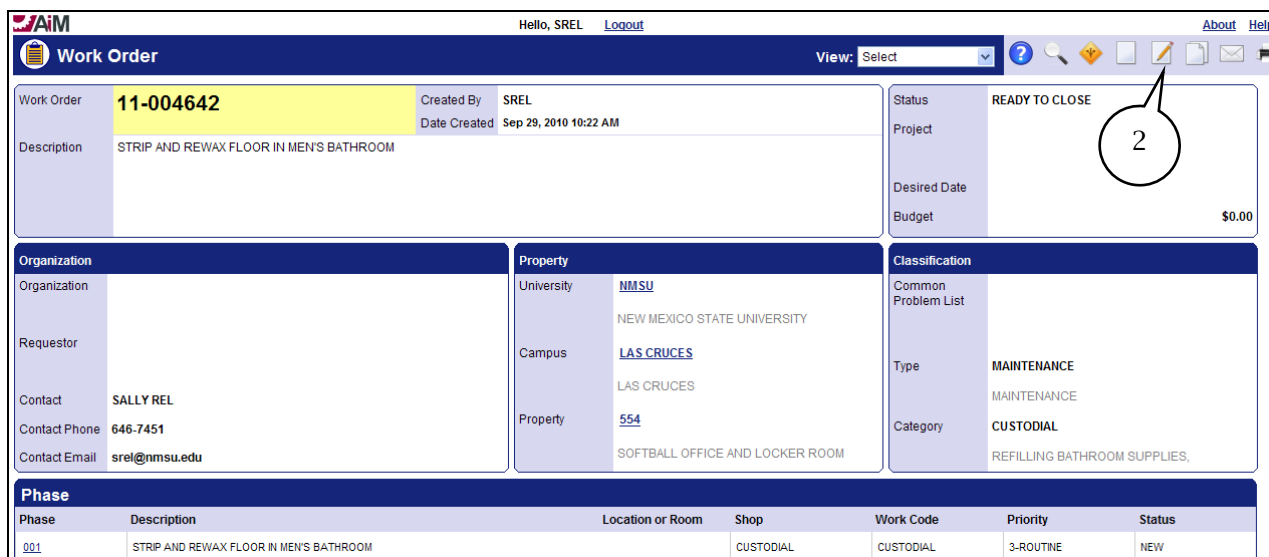
9. Click on the **Shop Zoom** icon and make a selection.
10. Click on the **Priority Zoom** icon and make a selection.
11. **Funding Source** will automatically populate to *Shop* and should only be changed if directed by OFS Accounting by clicking on the arrow and making the appropriate selection.
12. Click on the **Status Zoom** icon and select **Assigned**.
13. Click on the **Work Code Zoom** icon and make a selection.
14. Click on the **Done** icon and the following screen will be displayed.

15. Click on the **Save** icon, then a copy of the *Work Order* can be printed.
The Creating a Work Order process is now complete!

Creating a New Phase for an existing Work Order

Only one OFS Shop can order materials, charge time, etc. to any *Phase* of a *Work Order*. Therefore, if another Shop needs to conduct work on a *Work Order*, a new *Phase* must be created by completing the following steps.

1. Use the **Search** feature to locate and open the *Work Order*, and the following screen will be displayed.



AiM Hello, SREL Logout View: Select ? [Icons]

Work Order

Work Order: **11-004642** Created By: SREL Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: **READY TO CLOSE** (Callout 2)

Project: [Blank]

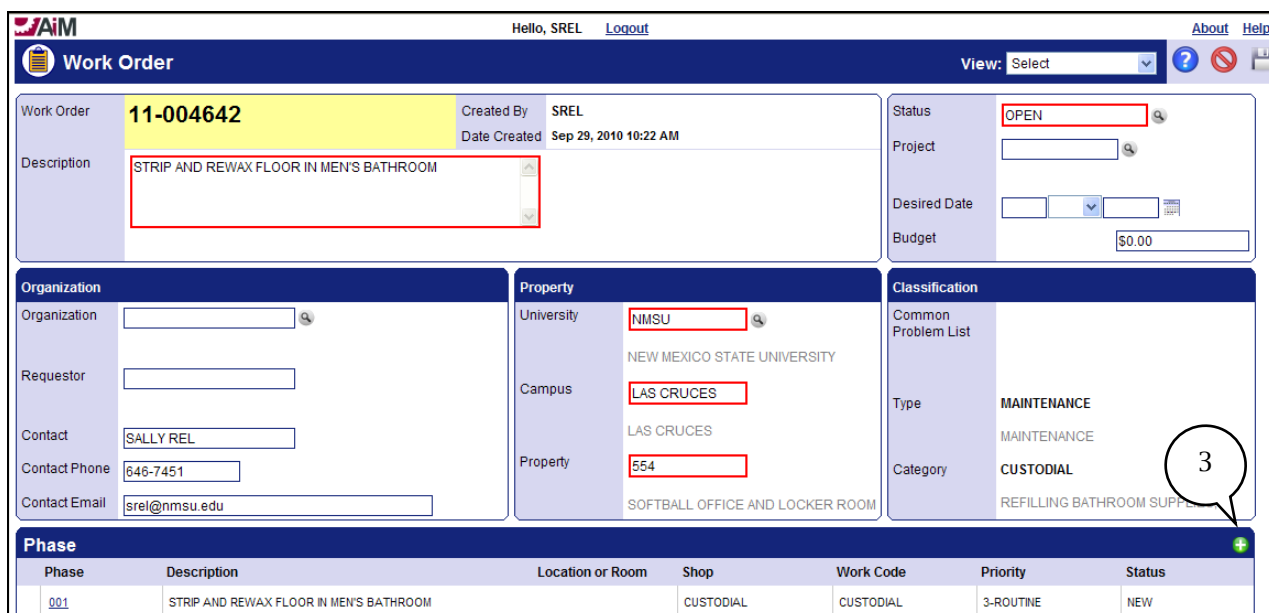
Desired Date: [Blank]

Budget: \$0.00

Organization	Property	Classification
Organization: [Blank]	University: NMSU NEW MEXICO STATE UNIVERSITY	Common Problem List: [Blank]
Requestor: [Blank]	Campus: LAS CRUCES LAS CRUCES	Type: MAINTENANCE
Contact: SALLY REL	Property: 554 SOFTBALL OFFICE AND LOCKER ROOM	Category: CUSTODIAL
Contact Phone: 646-7451		REFILLING BATHROOM SUPPLIES
Contact Email: srel@nmsu.edu		

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

2. Click on the **Edit** icon and the following screen will be displayed.



AiM Hello, SREL Logout View: Select ? [Icons]

Work Order

Work Order: **11-004642** Created By: SREL Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: **OPEN**

Project: [Blank]

Desired Date: [Blank]

Budget: \$0.00

Organization	Property	Classification
Organization: [Blank]	University: NMSU NEW MEXICO STATE UNIVERSITY	Common Problem List: [Blank]
Requestor: [Blank]	Campus: LAS CRUCES LAS CRUCES	Type: MAINTENANCE
Contact: SALLY REL	Property: 554 SOFTBALL OFFICE AND LOCKER ROOM	Category: CUSTODIAL
Contact Phone: 646-7451		REFILLING BATHROOM SUPPLIES
Contact Email: srel@nmsu.edu		

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

(Callout 3 points to the '+' icon in the Phase table header)

3. Click on the **Add Phase** icon and the following screen will be displayed.

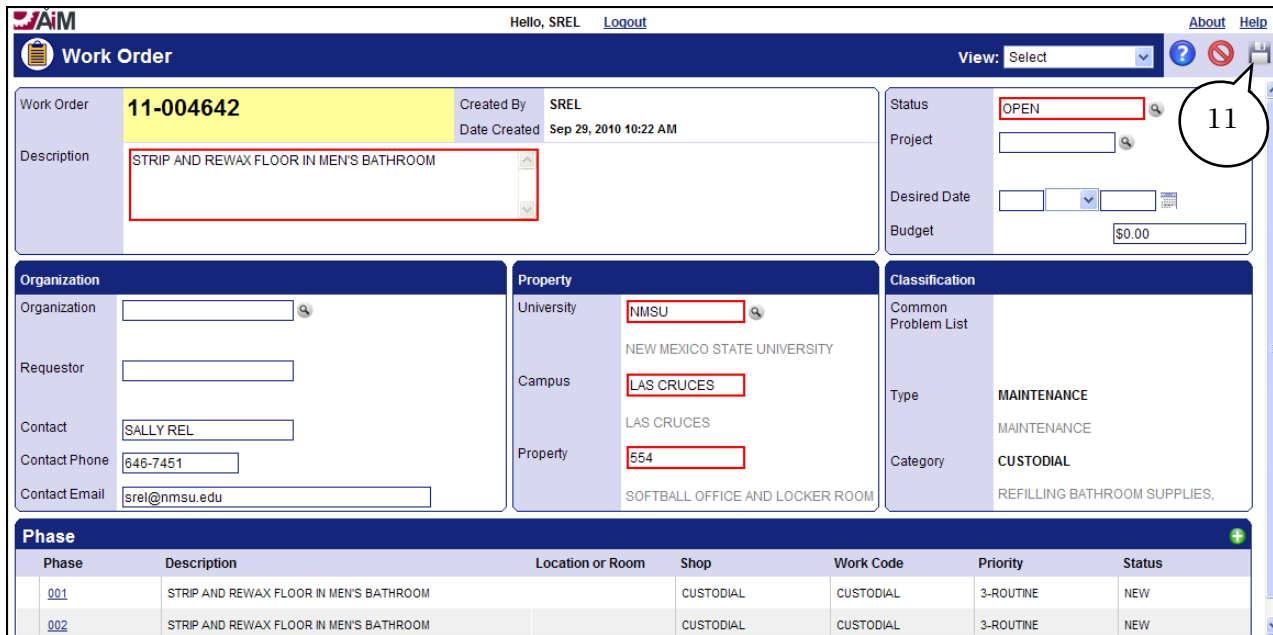
The screenshot shows the 'Phase' form in the AiM system. The form is divided into several sections: Phase, Shop, Estimated Dates, Classification, Equipment, Asset, and Contractor. The 'Phase' section has fields for Phase (002), Description (STRIP AND REWAX FLOOR IN MEN'S BATHROOM), Created By (SREL), and Date Created (Sep 29, 2010 11:02 AM). The 'Shop' section has fields for Shop, Shop Person, and Priority. The 'Estimated Dates' section has fields for Start and End. The 'Classification' section has fields for Funding Source (Shop), Work Code Group, Work Code, and Request Method. The 'Equipment' section has fields for Equipment and Equipment Group. The 'Asset' section has fields for Asset and Asset Type. The 'Contractor' section has a field for Type. Callouts 4, 5, 6, and 7 point to the Description field, the Shop field, the Priority field, and the Status field (NEW) respectively.

4. Type in a description of the work needed for the new *Phase* in the **Description** field.
5. Click on the **Shop Zoom** icon and select the desired **Shop**.
6. Click on the **Priority Zoom** icon and make a selection.
7. The **Status** field should default to **New**; if not, click on the **Zoom** icon and select **New**.

The screenshot shows the 'Phase' form after several selections. The 'Phase' section remains the same. The 'Shop' section now shows 'CUSTODIAL' as the selected Shop, with 'F00460: CUSTODIAL SHOP' displayed below it. The 'Priority' section now shows '3-ROUTINE' as the selected Priority. The 'Classification' section now shows 'Shop' as the selected Funding Source. Callouts 8, 9, and 10 point to the Funding Source field, the Work Code field, and the Status field (NEW) respectively.

8. The **Funding Source** field defaults to *Shop* and should only be changed if directed by OFS Accounting by clicking on the arrow and making the appropriate selection.
9. Click on **Work Code Zoom** icon and make a selection.

10. Click on the **Done** icon and the following screen, which reflects the new *Phase*, will be displayed.



AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Work Order View:

Work Order: **11-004642** Created By: SREL Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: **OPEN**

Project:

Desired Date:

Budget: \$0.00

Organization

Organization:

Requestor:

Contact: SALLY REL

Contact Phone: 646-7451

Contact Email: srel@nmsu.edu

Property

University: **NMSU**
NEW MEXICO STATE UNIVERSITY

Campus: **LAS CRUCES**
LAS CRUCES

Property: **554**
SOFTBALL OFFICE AND LOCKER ROOM

Classification

Common Problem List

Type: **MAINTENANCE**
MAINTENANCE

Category: **CUSTODIAL**
REFILLING BATHROOM SUPPLIES,

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW
002	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

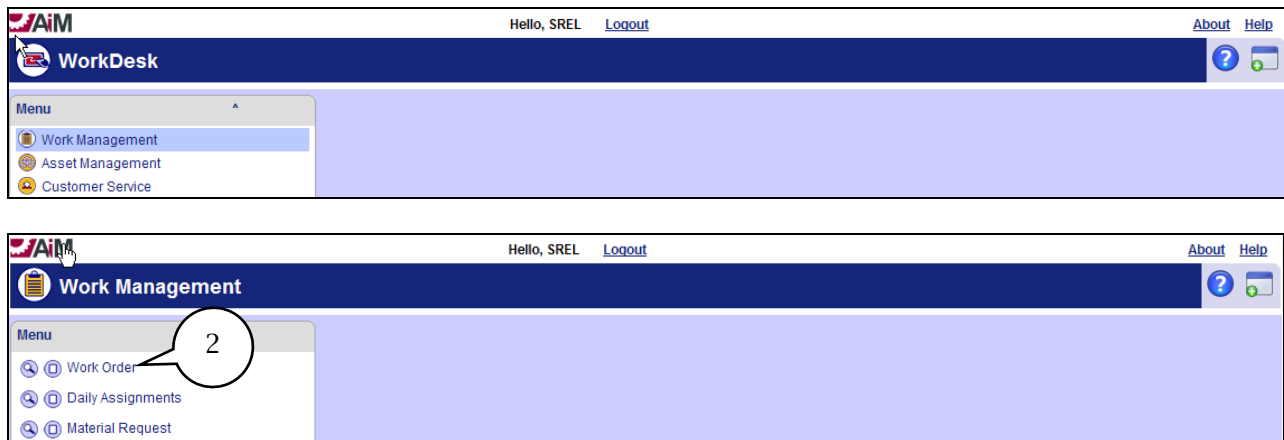
11. Click on the **Save** icon.

The Creating a New Phase for an existing Work Order process is now complete!

Assigning Work Orders

Upon initiation of a Work Order, **Shop Person** (employee) assignments may or may not be made by the OFS Work Order desk. The supervisor has the authority to make assignments to employees, or change assignments made by the Work Order desk. The following steps must be completed to make a **Shop Person** assignment.

1. Select the **Work Management** module and the following drop down list will be displayed.



2. Click on **Work Order** and the following screen will be displayed.

The screenshot shows the AiM Work Order form. The top navigation bar includes the AiM logo, user information 'Hello, SREL', a 'Logout' link, and links for 'About' and 'Help'. The main header is 'Work Order' with a 'View: Select' dropdown. The form is divided into several sections: 'Work Order' (with fields for Description, Created By, Date Created, Status, Project, Desired Date, Budget), 'Organization' (with fields for Organization, Requestor, Contact, Contact Phone, Contact Email), 'Property' (with fields for University, Campus, Property), and 'Classification' (with fields for Common Problem List, Type, Category). At the bottom is a 'Phase' table with columns: Phase, Description, Location or Room, Shop, Work Code, Priority, and Status. A callout bubble with the number '3' points to the 'Search' icon in the top right corner.

3. Click on the **Search** icon and the following screen will be displayed.

The screenshot shows the 'Work Order' form in the AiM system. The form has a dark blue header with the AiM logo, user name 'Hello, SREL', and a 'Logout' link. Below the header, there are various input fields for work order details. A callout bubble with the number 4 points to the scroll bar on the right side of the form.

4. Use the scroll bar to move down to the **Phase** block, click on the **Shop Zoom** icon, select the appropriate **Shop** from the screen that is displayed, then the following screen will be displayed.

Note: If Phase block is not displayed click on the *Show* to display fields.

The screenshot shows the 'Work Order' form with the 'Phase' block expanded. The 'Phase' block contains fields for Phase, Status, Description, Estimated Start Date, Estimated End Date, Work Code, Shop, and Estimate Hours. A callout bubble with the number 5 points to the 'Execute Search' icon in the top right corner of the form.

5. Click on the **Execute Search** icon and the following screen will be displayed.

<div> Hello, SREL Logout About Help </div>										
Work Order										
PRJFEE-1006	PROJECT FEE CAMPUS EMERGENCY SIRENS	READY TO CLOSE	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	NON-BUILDING	OFS PROJECT MANAGEMENT	Dec 17, 2009	
PRJFEE-1004	PRJFEE-WORK ORDER FOR DACC MAIN: REPLACE THE CHILLER	OPEN	MAINTENANCE	CORRECTIVE	NMSU	DONA ANA	341	DABCC FACILITIES SUPP	Dec 17, 2009	
PRJFEE-1004	PROJECT FEE GARAGE FRESH AIR UPGRADE	READY TO CLOSE	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	154	OFS PROJECT MANAGEMENT	Dec 17, 2009	
PRJFEE-1084	PRJFEE: PSL WEB SITE PROJECT PROJECT MGT FEE	OPEN	PROJECTS	SUPPORT	NMSU	LAS CRUCES	263		Feb 04, 2010	
PRJFEE-1098	CONCRETE SIDEWALKS BY SPEACH BUILDING	READY TO CLOSE	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	ZONE 2200		Feb 12, 2010	
11-STD-STDKEY	2011 STANDING WORK ORDER FOR ALL STANDARD KEYS ACTUAL CHARGES	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	218	OFS LOCKSMITH	Jul 13, 2010	
11-STD-HISECKEY	STANDING WORK ORDER FOR ALL HIGH SECURITY KEYS ACTUAL CHARGES	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	218	OFS LOCKSMITH	Jul 13, 2010	
11-004842	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	READY TO CLOSE	MAINTENANCE	CUSTODIAL	NMSU	LAS CRUCES	554		Sep 29, 2010	

- Click on the desired **Work Order** number and the following screen will be displayed.



Supervisors can create a *Personal Query* link for quick access to *Work Orders* assigned to their shops.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Work Order View:

Work Order	11-004642	Created By	SREL	Status	OPEN
		Date Created	Sep 29, 2010 10:22 AM	Project	
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM			Desired Date	
				Budget	\$0.00

Organization	Property	Classification
Organization	University	Common Problem List
	NMSU	
	NEW MEXICO STATE UNIVERSITY	
Requestor	Campus	Type
	LAS CRUCES	MAINTENANCE
Contact	Property	MAINTENANCE
SALLY REL	554	CUSTODIAL
Contact Phone		REFILLING BATHROOM SUPPLIES,
646-7451		
Contact Email		
srel@nmsu.edu		

Phase						
Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

7. Click on the **Edit** icon and the following screen will be displayed.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Work Order View:

Work Order	11-004642	Created By	SREL	Status	OPEN
		Date Created	Sep 29, 2010 10:22 AM	Project	
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM			Desired Date	
				Budget	\$0.00

Organization	Property	Classification
Organization	University	Common Problem List
	NMSU	
	NEW MEXICO STATE UNIVERSITY	
Requestor	Campus	Type
	LAS CRUCES	MAINTENANCE
Contact	Property	MAINTENANCE
SALLY REL	554	CUSTODIAL
Contact Phone		REFILLING BATHROOM SUPPLIES,
646-7451		
Contact Email		
srel@nmsu.edu		

Phase						
Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

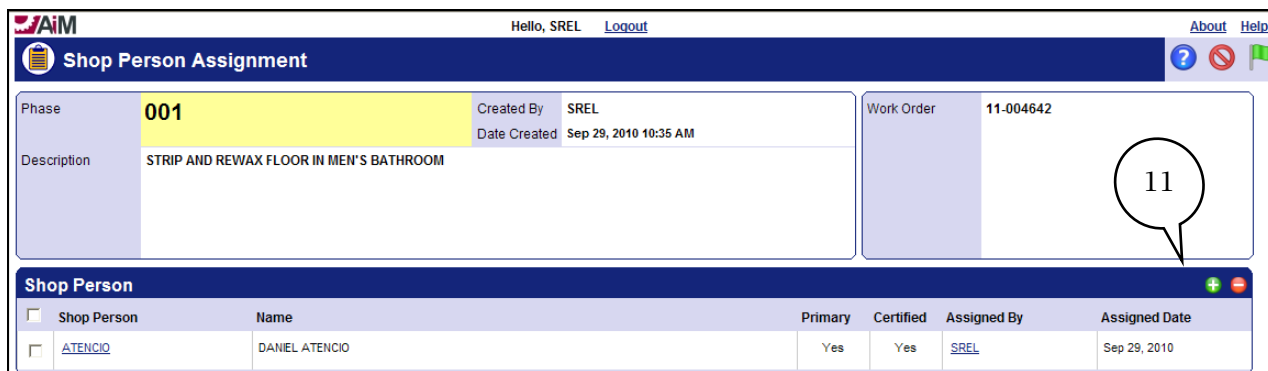
8. Click on the desired **Phase** number and the following screen will be displayed.

The screenshot shows the AiM Phase screen. At the top, there is a header bar with the AiM logo, user information 'Hello, SREL', and a 'Logout' link. Below the header, there is a 'View: Select' dropdown menu. A callout bubble with the number '9' points to this dropdown menu. The main content area is divided into several sections: 'Phase' (001, Created By: SREL, Date Created: Sep 29, 2010 10:35 AM), 'Description' (STRIP AND REWAX FLOOR IN MEN'S BATHROOM), 'Shop' (CUSTODIAL, F00460:CUSTODIAL SHOP, Primary Person: ATENCIO, Priority: 3-ROUTINE), 'Estimated Dates' (Start, End), 'Classification' (Funding Source: Shop, Work Code Group: INTERIORS, Work Code: CUSTODIAL, Request Method), 'Equipment' (Equipment, Equipment Group), 'Asset' (Asset, Asset Type), and 'Contractor' (Type). The 'View: Select' dropdown menu is open, showing options: Select, Extra Description, Shop Person, Account Setup, Shop Stock, Checkpoint Measurements, Email Log, Survey History, Estimates, Material Requests, User Defined Fields, Status History, and Related Documents.

9. Click on the desired **View Select** field arrow and the following screen will be displayed.

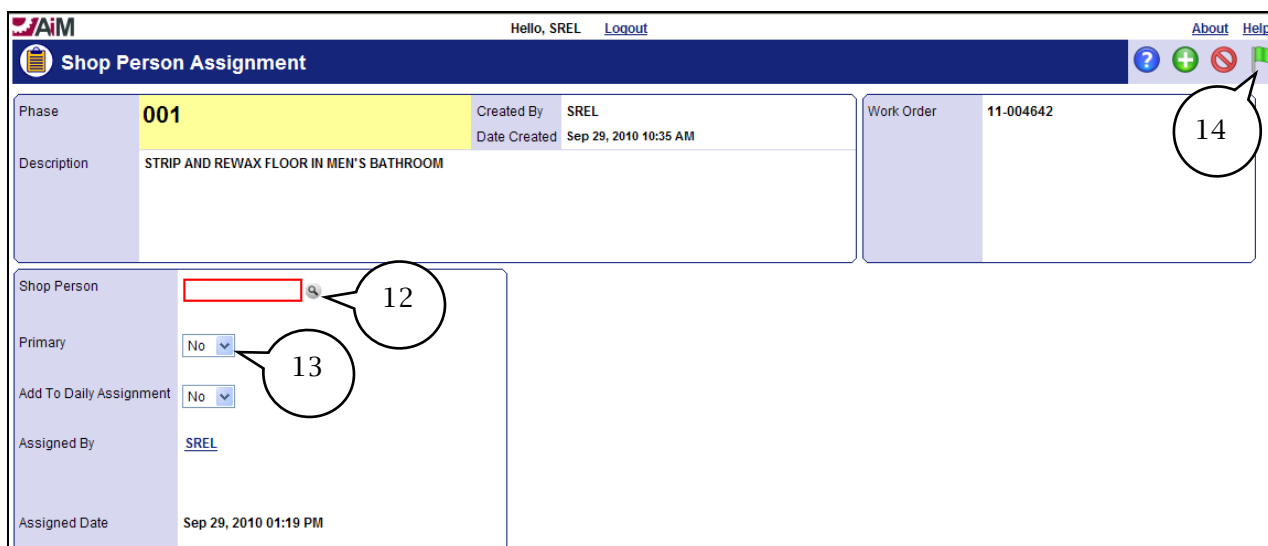
The screenshot shows the AiM Phase screen with the 'View: Select' dropdown menu open. A callout bubble with the number '10' points to the 'Shop Person' option in the dropdown menu. The dropdown menu is open, showing options: Select, Extra Description, Shop Person, Account Setup, Shop Stock, Checkpoint Measurements, Email Log, Survey History, Estimates, Material Requests, User Defined Fields, Status History, and Related Documents. The 'Shop Person' option is highlighted. The main content area is the same as in the previous screenshot.

10. Click on the **Shop Person** field arrow and the following screen will be displayed.



Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/>	ATENCIO	Yes	Yes	SREL	Sep 29, 2010

11. Click on the **Add Shop Person** icon and the following screen will be displayed.



12. Enter employee *Username* in **Shop Person** field then click the **Zoom** icon which will validate and populate the field if the *Username* is correct or click on the **Zoom** icon and select the appropriate **Employee ID**, or use the *Search* feature described in the *Performing a Search Query* section.
13. Click on the **Primary** field arrow, and select **Yes**, if *Shop Person* selected is going to be designated as the *Primary*.
14. Click on the **Done** icon and the following screen, reflecting the *Shop Person* assignment, will be displayed.

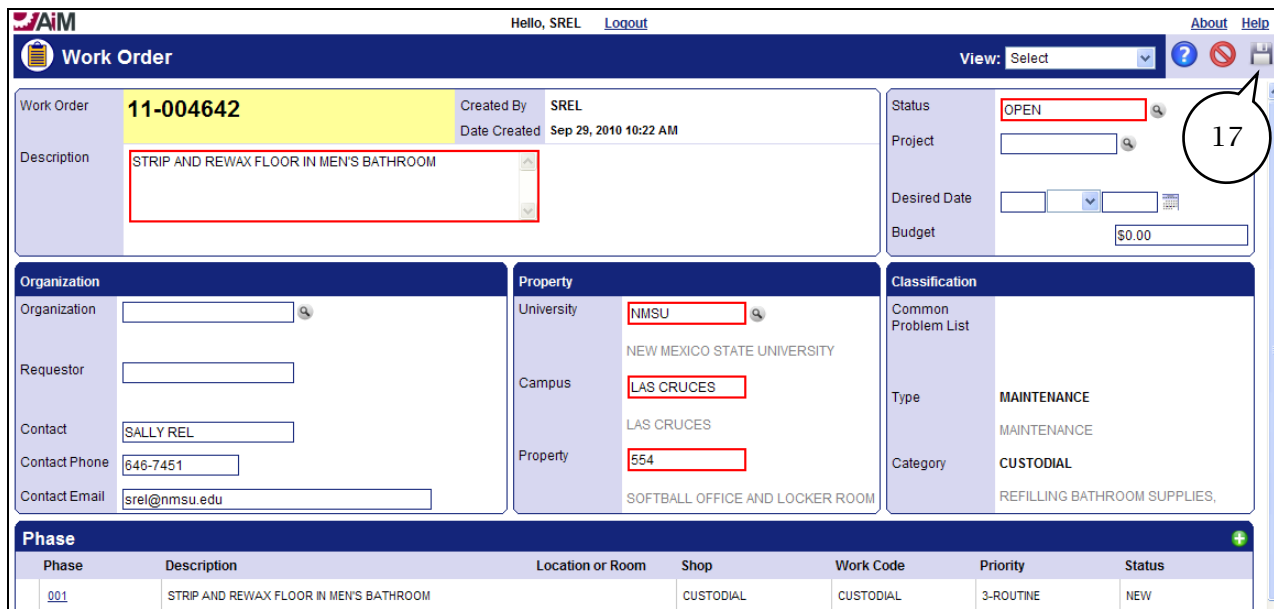
Note: Additional employees can be assigned to a *Phase*; however, only one employee can be designated as the *Primary Shop Person* for any specific *Phase* of a *Work Order*.

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> ATENCIO	DANIEL ATENCIO	No	Yes	SREL	Sep 29, 2010

15. Again, click on the **Done** icon and the following screen will be displayed.

Shop	Estimated Dates	Classification
Shop: <input type="text" value="CUSTODIAL"/> F00460:CUSTODIAL SHOP Primary Person: ARTL ART LUCERO Priority: <input type="text" value="3-ROUTINE"/>	Start: <input type="text"/> End: <input type="text"/>	Funding Source: <input type="text" value="Shop"/> Work Code Group: <input type="text" value="INTERIORS"/> Work Code: <input type="text" value="CUSTODIAL"/> CUSTODIAL Request Method: <input type="text"/>

16. Again, click on the **Done** icon and the following screen will be displayed.



AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Work Order View: [Select](#)

Work Order: **11-004642** Created By: SREL Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: **OPEN**

Project:

Desired Date:

Budget: \$0.00

Organization

Organization:

Requestor:

Contact: SALLY REL

Contact Phone: 646-7451

Contact Email: srel@nmsu.edu

Property

University: **NMSU**
NEW MEXICO STATE UNIVERSITY

Campus: **LAS CRUCES**
LAS CRUCES

Property: **554**
SOFTBALL OFFICE AND LOCKER ROOM

Classification

Common Problem List:

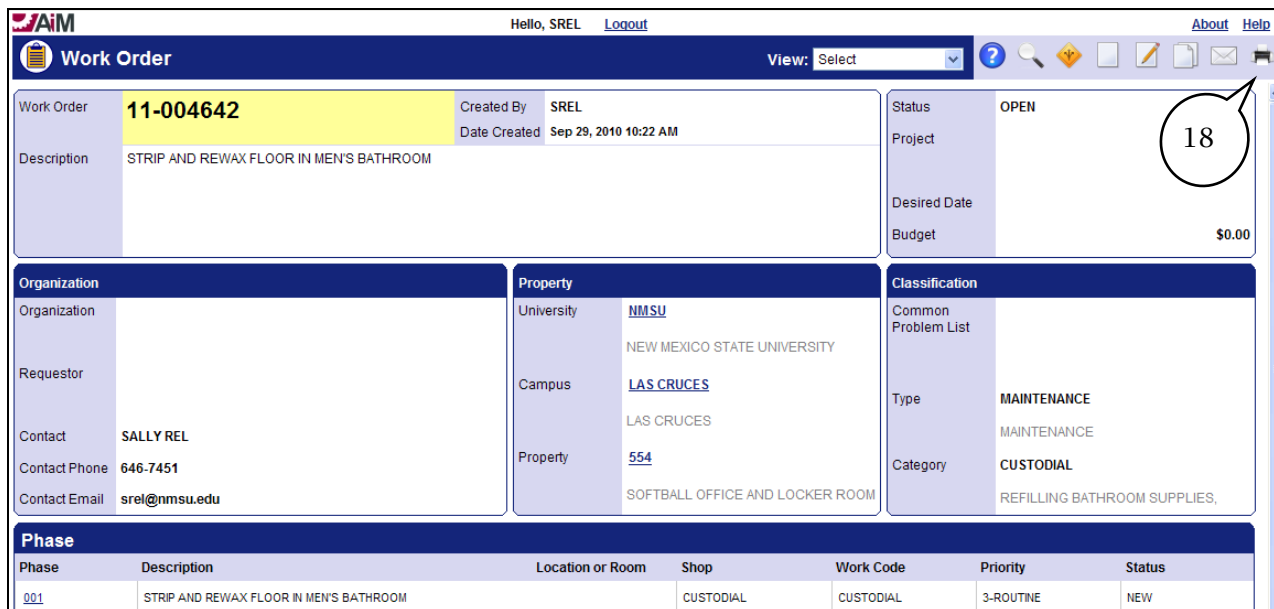
Type: **MAINTENANCE**
MAINTENANCE

Category: **CUSTODIAL**
REFILLING BATHROOM SUPPLIES,

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
<u>001</u>	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

17. Click on the **Save** icon and the following screen will be displayed.



AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Work Order View: [Select](#)

Work Order: **11-004642** Created By: SREL Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: **OPEN**

Project:

Desired Date:

Budget: \$0.00

Organization

Organization:

Requestor:

Contact: SALLY REL

Contact Phone: 646-7451

Contact Email: srel@nmsu.edu

Property

University: [NMSU](#)
NEW MEXICO STATE UNIVERSITY

Campus: [LAS CRUCES](#)
LAS CRUCES

Property: [554](#)
SOFTBALL OFFICE AND LOCKER ROOM

Classification

Common Problem List:

Type: **MAINTENANCE**
MAINTENANCE

Category: **CUSTODIAL**
REFILLING BATHROOM SUPPLIES,

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
<u>001</u>	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

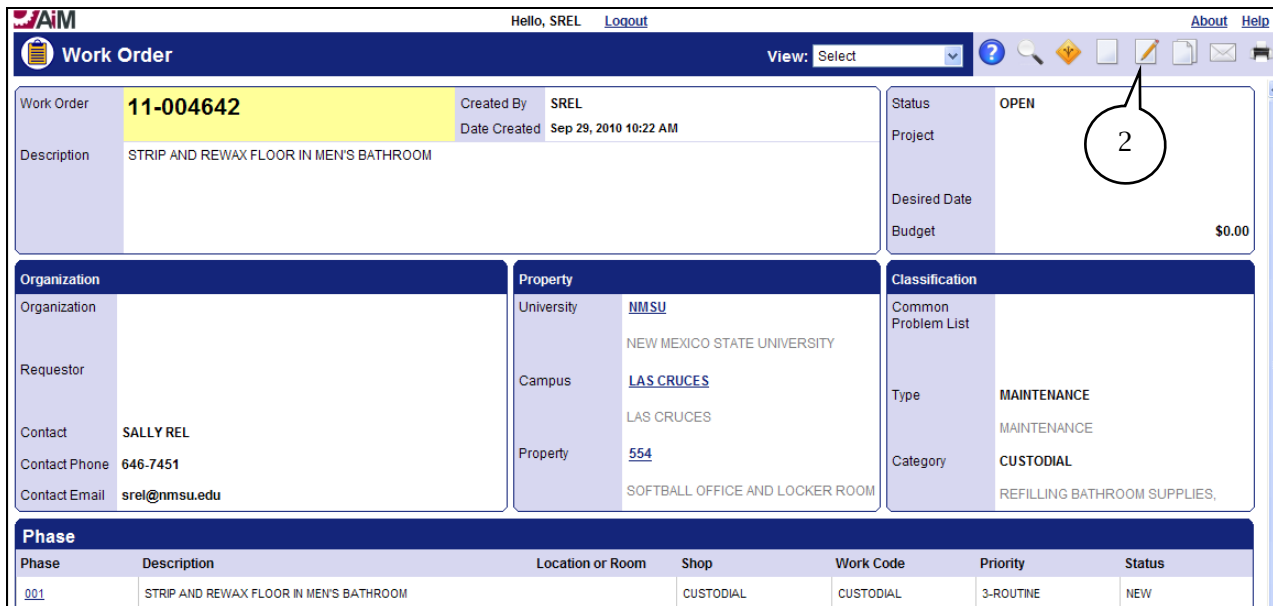
18. Click on the **Print** icon and give a copy to the employee(s) assigned to the **Work Order**.

The Assigning Work Orders process is now complete!

Closing Phases & Work Orders

When a shop has completed the work required on a *Work Order*, and *Shop Person(s)* time has been entered, the *Phase* needs to have the *Status* changed to reflect that the work has been completed. In addition, when a *Work Order* has more than one *Phase* and once they have all been completed, the *Work Order Status* must be changed by completing the following steps.

1. Using the *Search* feature, open the desired *Work Order* and the following screen will be displayed.



Work Order 11-004642
 Created By: SREL
 Date Created: Sep 29, 2010 10:22 AM
 Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Organization
 Organization: [Empty]
 Requestor: [Empty]
 Contact: SALLY REL
 Contact Phone: 646-7451
 Contact Email: srel@nmsu.edu

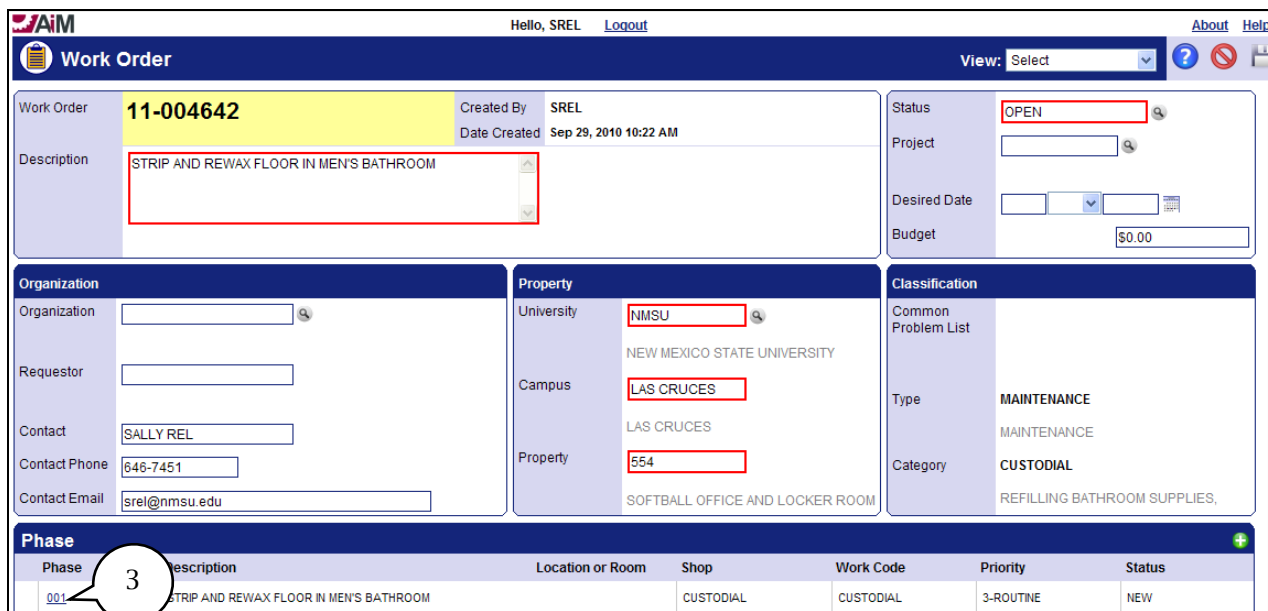
Property
 University: [NMSU](#)
 NEW MEXICO STATE UNIVERSITY
 Campus: [LAS CRUCES](#)
 LAS CRUCES
 Property: [554](#)
 SOFTBALL OFFICE AND LOCKER ROOM

Classification
 Common Problem List: [Empty]
 Type: MAINTENANCE
 MAINTENANCE
 Category: CUSTODIAL
 REFILLING BATHROOM SUPPLIES.

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

2. Click on the **Edit** icon and the following screen will be displayed.



Work Order: **11-004642** Created By: SREL Date Created: Sep 29, 2010 10:22 AM

Status: **OPEN**

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

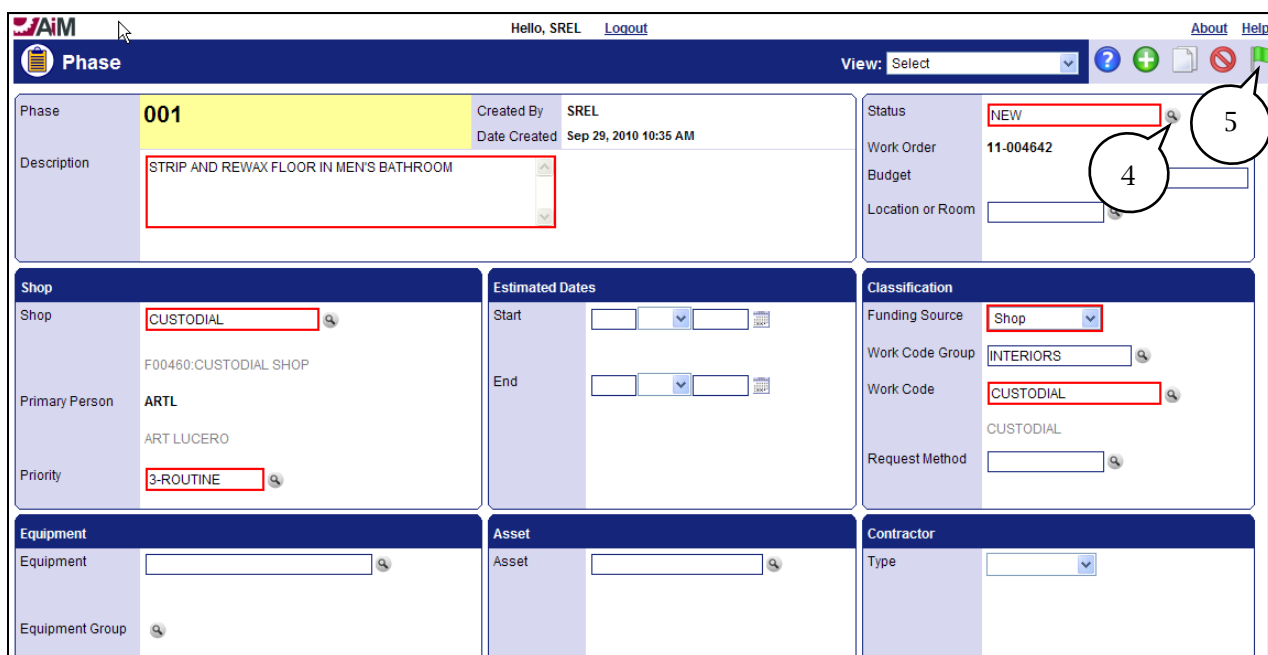
Organization: [] Requestor: [] Contact: SALLY REL Contact Phone: 646-7451 Contact Email: srel@nmsu.edu

Property: University: **NMSU** NEW MEXICO STATE UNIVERSITY Campus: **LAS CRUCES** Property: **554** SOFTBALL OFFICE AND LOCKER ROOM

Classification: Common Problem List: [] Type: **MAINTENANCE** Category: **CUSTODIAL** REFILLING BATHROOM SUPPLIES.

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

3. Click on the desired **Phase** number and the following screen will be displayed.



Phase: **001** Created By: SREL Date Created: Sep 29, 2010 10:35 AM

Status: **NEW**

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Shop: **CUSTODIAL** F00460:CUSTODIAL SHOP Primary Person: **ARTL** ART LUCERO Priority: **3-ROUTINE**

Estimated Dates: Start: [] End: []

Classification: Funding Source: **Shop** Work Code Group: **INTERIORS** Work Code: **CUSTODIAL** Request Method: []

Equipment: [] Asset: [] Contractor: []

4. Click on the **Status Zoom** icon and make the appropriate selection.
5. Click on the **Done** icon and the following screen, reflecting the changed **Phase Status**, will be displayed.

Work Order: 11-004642
Created By: SREL
Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: OPEN
Project:
Desired Date:
Budget: \$0.00

Organization:
Requestor:
Contact: SALLY REL
Contact Phone: 646-7451
Contact Email: srel@nmsu.edu

Property:
University: NMSU
NEW MEXICO STATE UNIVERSITY
Campus: LAS CRUCES
LAS CRUCES
Property: 554
SOFTBALL OFFICE AND LOCKER ROOM

Classification:
Common Problem List:
Type: MAINTENANCE
MAINTENANCE
Category: CUSTODIAL
REFILLING BATHROOM SUPPLIES,

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

6. Click on the **Save** icon and the following screen will be displayed.

Work Order: 11-004642
Created By: SREL
Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: OPEN
Project:
Desired Date:
Budget: \$0.00

Organization:
Requestor:
Contact: SALLY REL
Contact Phone: 646-7451
Contact Email: srel@nmsu.edu

Property:
University: NMSU
NEW MEXICO STATE UNIVERSITY
Campus: LAS CRUCES
LAS CRUCES
Property: 554
SOFTBALL OFFICE AND LOCKER ROOM

Classification:
Common Problem List:
Type: MAINTENANCE
MAINTENANCE
Category: CUSTODIAL
REFILLING BATHROOM SUPPLIES,

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

7. Click on the **Print** icon to print a copy if needed.
8. If all **Phases** reflect a status of **Work Complete**, as represented in the screen above, the **Work Order Status** must be changed by clicking on the **Edit** icon and the following screen will be displayed.

AiM Hello, SREL [Logout](#) [About](#) [Help](#)

Work Order View: [Select](#)

Work Order: **11-004642** Created By: SREL Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: **OPEN**

Project:

Desired Date:

Budget: \$0.00

Organization

Organization:

Requestor:

Contact: SALLY REL

Contact Phone: 646-7451

Contact Email: srel@nmsu.edu

Property

University: **NMSU**
NEW MEXICO STATE UNIVERSITY

Campus: **LAS CRUCES**
LAS CRUCES

Property: **554**
SOFTBALL OFFICE AND LOCKER ROOM

Classification

Common Problem List

Type: **MAINTENANCE**
MAINTENANCE

Category: **CUSTODIAL**
REFILLING BATHROOM SUPPLIES,

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

9. Click on the **Status Zoom** icon and the following screen will be displayed.

Work Order Status

Sequence	Status	Description
10	OPEN	OPEN
20	IMMEDIATE CLOSE	IMMEDIATE CLOSE
30	READY TO CLOSE	READY TO CLOSE
40	CANCELLED	CANCELLED

10. Under the **Status** column select **Ready to Close** if there are *Material Requests* that still need to be posted to the *Work Order*; if not, select **Immediate Close** and the following screen will be displayed.

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Work Order

View: Select

Work Order: **11-004642**
Created By: SREL
Date Created: Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: **READY TO CLOSE**
Project:
Desired Date:
Budget: \$0.00

Organization:
Requestor:
Contact: SALLY REL
Contact Phone: 646-7451
Contact Email: srel@nmsu.edu


Property:
University: NMSU
NEW MEXICO STATE UNIVERSITY
Campus: LAS CRUCES
LAS CRUCES
Property: 554
SOFTBALL OFFICE AND LOCKER ROOM


Classification:
Common Problem List:
Type: MAINTENANCE
MAINTENANCE
Category: CUSTODIAL
REFILLING BATHROOM SUPPLIES.

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

11. Click on the **Save** icon, then click on the **Print** icon if a copy is needed.


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Work Order

View: Select
?

Work Order	11-004642	Created By	SREL	Status	READY TO CLOSE
		Date Created	Sep 29, 2010 10:22 AM	Project	
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM			Desired Date	
				Budget	\$0.00

Organization	Property	Classification
Organization	University NMSU	Common Problem List
	NEW MEXICO STATE UNIVERSITY	
Requestor	Campus LAS CRUCES	Type
	LAS CRUCES	MAINTENANCE
Contact	Property 554	
SALLY REL	SOFTBALL OFFICE AND LOCKER ROOM	MAINTENANCE
Contact Phone		Category
646-7451		CUSTODIAL
Contact Email		REFILLING BATHROOM SUPPLIES,
srel@nmsu.edu		

Phase						
Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

The Closing Phases and Work Orders process is now complete!